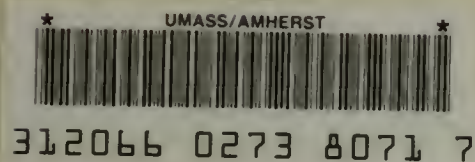


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EVALUATION OF EDUCATIONAL PERSONNEL

**A Report of the Massachusetts Board of
Education Study Committee**

June 1980

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TABLE OF CONTENTS

I. Introduction (Purpose, Process of Study, General Findings, Study Committee Membership)	1
II. Definition and Principles of Evaluation	6
III. Recommendations of the Study Committee	8
IV. "State of the Art" of Evaluation in Massachusetts	10
V. Illustrative Practices	27
VI. Training for Evaluators	145
VII. Legal Aspects of Evaluation	158
VIII. Model Evaluation Plans: Massachusetts and Out-of-State School Districts	164
IX. Committee Procedures Followed for the Study	179

Appendices

A. State Board of Education Charge to Study Committee	182
B. Massachusetts Standards for Certification	183
C. Position Papers of Education Associations on Evaluation of Educational Personnel	188
D. Massachusetts General Laws, Chapter 71, Sections 41, 42 and 42A	198

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SECTION I

INTRODUCTION TO THE STUDY COMMITTEE REPORT

State Board Charge to the Study Committee

The State Board of Education appointed the Study Committee on Educational Personnel in November 1979. Its purpose was to advise the State Board, local school officials and the general public on ways to improve the evaluation and performance of educational personnel in Massachusetts.

To do this, the State Board assigned the Study Committee five tasks:

- * To review current practices and identify, on the basis of these practices and relevant research, principles which underlie sound evaluation procedures for educational personnel.
- * To provide a forum for the identification of evaluation practices in Massachusetts and elsewhere which are considered effective and equitable by those affected by the practices.
- * To elicit from educational and other interested organizations and individuals ideas for the improvement of the evaluation of educational personnel in Massachusetts.
- * To identify and recommend information to be disseminated on evaluation practices in Massachusetts and nationally which demonstrate the principles of sound evaluation and performance improvement deemed most important by the Study Committee.
- * To submit to the State Board of Education a report of findings, conclusions and recommendations by no later than June 1980.

Representative Membership

The Study Committee's membership was broadly representative of the education community and the general public. Members were proposed by their respective associations and included four teachers, four administrators and seven public members (representing school committees, parents, students and state legislators). The State Commissioner of Education and the Executive Deputy Commissioner co-chaired the Study Committee.

Open Procedures

All meetings of the Study Committee were public and provided for an opportunity at the beginning of each meeting for any interested person to address the Committee. Two public forums were held in March in the western and eastern parts of the Commonwealth to elicit ideas and reactions to draft positions of the Committee. A public hearing was held on May 21, 1980 on the Committee's draft recommendations. Copies of all Study Committee documents were mailed to school committees, superintendents, education associations and other interested persons. Meetings and findings were reported in the Department of Education's monthly newspaper.

General Findings of the Study Committee

The sections which follow in this report detail the Study Committee's findings and recommendations. During the course of its deliberations, certain general findings became clear to the Committee. These may be summarized as follows:

- * All Massachusetts school districts have some kind of formal evaluation systems for teachers. Some of these systems are comprehensive, most are not.
- * There is strong opposition to any state mandate for evaluation of educational personnel. Only one organization (the Massachusetts League of Women Voters) testified in favor of legislation in this area; all others expressed strong opposition to any such state prescription or requirement.
- * If the public wants good evaluation of educational personnel, it must recognize that this takes staff time. School districts which have made such a commitment feel it is worthwhile. Where such a commitment is not present, evaluation policies are often viewed with mistrust and resentment by those affected.
- * Formal evaluation procedures for administrators, supervisors and professional personnel other than teachers are the exception rather than the rule. This also appears to be true for all personnel once they are granted tenure.
- * There is broad agreement that more and better training in evaluation skills is needed for those charged with the responsibility for evaluating educational personnel.
- * Differences exist throughout the Commonwealth as to whether evaluation policies are or should be subject to collective bargaining. There is general consensus, however, that any such policies should be clearly communicated and understood by all concerned, and that it is a sound evaluation practice for the person being evaluated to have an opportunity to discuss the criteria to be used by the person who evaluates.
- * The impact of "reductions in force" due to declining enrollments and budget constraints has created an atmosphere of tension and suspicion over evaluation policies. Employee organizations generally favor reductions in force by seniority; employer organizations generally favor including some judgment based on performance. This very real concern permeated our hearings and the deliberations of the Study Committee itself, since the Committee was representative. It was the Committee's conclusion that provisions for "reductions in force" can only be resolved through collective bargaining decisions in each school district and should not be a matter for the Study Committee. Separate from this conclusion, however, was the unanimous position of the Study Committee that evaluation of educational personnel was so important to the quality of educational performance and to public confidence in the Commonwealth's schools that each school district should have a comprehensive policy for the evaluation of all educational personnel on a regular and continuing basis.
- * Several persons testified before the committee on the difference between supervision and evaluation. Seldom is there sufficient supervisory staff in most Massachusetts schools to separate responsibility for supervision and evaluation. To do so procedurally is a matter for local decision. Our recommendations, therefore, do not differentiate between supervision and evaluation.

Data Gathering Procedures Followed

The Study Committee extensively reviewed articles analyzing research on the evaluation of educational personnel. Staff for the Study Committee contacted regional and national authorities on the subject and collected recommended model policies from other states. The evaluation policies of all Massachusetts' school districts were obtained, carefully analyzed and reported upon to the Committee. The Committee itself reviewed the best evaluation policies from Massachusetts and other states, as identified by Committee staff.

In addition to the public forums and public hearing, extensive correspondence was received by the Committee from educators across the state. The Committee also was assisted by Professor Terrence Deal of the Harvard Graduate School of Education, and by Dr. James Case and Sandra Moody, Esq. of the Department of Education.

Conclusion

It was the State Board of Education's intent in forming the Study Committee to provide information, guidance and assistance to local officials in order to improve the evaluation of educational personnel. The responsibility for this improvement, as we state in our first recommendation, should rest with local officials. It is our hope those officials and the public in general will find this report valuable to those efforts.

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SECTION II

DEFINITION AND PRINCIPLES OF EVALUATION

Early in its deliberations, the Study Committee developed a consensual definition of "evaluation" to use in discussions and review of materials. It is that definition which is used in the Study Committee's statement of findings and recommendations. The set of principles resulted from the Committee's wish to provide local school districts with standards or criteria to use as they reviewed or formulated local evaluation systems.

Definition of Evaluation

Personnel evaluation is the process of defining goals and of identifying, gathering and using information as part of a process to improve professional performance and to judge total job effectiveness.

PRINCIPLES OF EVALUATION

Overview

- * The purposes of evaluation should be stated clearly, in writing, for all parties involved.
- * All parties involved in the evaluation process should discuss the evaluation criteria in order to promote mutual commitment to them.
- * Evaluation criteria should be based on the employee's job responsibilities, jointly developed goals, local goals, program objectives, and instructional priorities as they relate to student learning.
- * Evaluation assumes that standards of effectiveness can be determined and that performance can be measured in terms of those standards.

Data Gathering

- * Evaluation evidence must be either observed or otherwise documented.
- * Data for evaluation should be collected over a sufficient period of time and should be maintained in the official personnel file.
- * The evaluation process must be flexible enough to provide for differences in the context of a staff member's assignment (characteristics of students, class size, characteristics of environment).
- * The evaluation process should allow the evaluatee to gather data in support of goal attainment and to provide individual self appraisal data on an optional basis.

Feedback Process

- * All evaluations should be communicated in writing to the persons being evaluated.
- * The evaluation process should provide recognition for positive performance as well as for inadequacies in performance.
- * The evaluation process should encourage creativity.

Implementation

- * Adequate provision for the protection of the rights of the evaluatee and evaluator shall underlie the evaluation process.
- * Evaluative data may be aggregated and used as a basis for assessing total job effectiveness
- * The evaluation process should provide specific recommendations and concrete resources for improving professional performance and enhancing student learning.
- * Training in evaluation skills should be provided regularly to those charged with the responsibility for evaluation.

SECTION III

RECOMMENDATIONS OF THE STUDY COMMITTEE

To improve the education of students in the public schools of the Commonwealth, the Study Committee on Evaluation of Educational Personnel submits to the State Board of Education, and through the State Board to local school officials, the following recommendations for the improvement of personnel evaluation in Massachusetts public schools. These recommendations, it should be stressed, apply to all educational personnel (administrators, supervisors, teachers and other professional staff). The recommendations are offered in the context of the Definition and Principles of Evaluation adopted unanimously by the Study Committee and contained in Section II of this report. Implementation of the recommendations by a school district, of course, are subject to the provisions of collective bargaining agreements of that school district.

- * The evaluation of educational personnel is the responsibility of each local school district. Evaluation policies should be locally designed and locally controlled.
- * Higher priority should be given by Massachusetts public school districts to improved evaluation of educational personnel. Higher priority also should be given in staff time and other available resources to improve the evaluation of educational personnel.
- * Each school district should have a comprehensive evaluation policy which includes the philosophical intent, content and process of evaluation for educational personnel.
- * The comprehensive evaluation policy of each school district should include regular evaluation of administrators, supervisors, teachers and other professional personnel.
- * Tenured as well as non-tenured educational personnel should be evaluated regularly. If present practices of the school district do not include evaluation of tenured educational personnel, a careful transition should be planned, by joint consultation of the parties affected, in accordance with collective bargaining provisions which may exist in each school district. Evaluation practices for tenured personnel, may be differentiated from those for non-tenured personnel, depending upon local decision.
- * Follow-up support should be provided for the improvement of performance noted in evaluation reports. This follow-up support should include a variety of resources such as in-service education, observation opportunities, peer assistance, increased supervision, help from personnel not involved in the evaluation process, and other techniques which may be designed by each school district.
- * Those responsible for evaluation of educational personnel in each school district should be trained in evaluation and provided with periodic opportunities for additional evaluation training.

- * Schools of education, other institutions of higher education (business and management colleges), professional associations and the state Department of Education should be encouraged by the State Board of Education to provide improved training opportunities for those responsible for the evaluation of educational personnel in Massachusetts school districts.
- * Provisions for “reductions in force” are subject to applicable collective bargaining agreements which may exist in a school district. Regardless of the particular provisions for “reductions in force”, there is a need for each school district to have a comprehensive evaluation policy.
- * Since sound evaluation is for the purpose of improving performance as well as judging performance, individual evaluation reports should identify areas in need of improvement as applicable, and should provide specific suggestions as to how this improvement can take place.
- * Evaluation reports should be cumulative. Areas in need of improvement noted in previous reports should be included in subsequent reports until the improvement expected has taken place.
- * The comprehensive evaluation policy should include clear procedures for the person being evaluated to interact regularly with the person (s) doing the evaluation in accordance with the principles in Section II of this report.
- * The comprehensive evaluation policy should provide an opportunity for the evaluation of educational personnel to be individualized to the extent that the person being evaluated has an opportunity to include individual goals, if he or she so desires, provided that such individual goals are not in conflict with school or district goals and obligations under applicable laws and regulations.
- * Criteria for evaluation of educational personnel should take into consideration the growth and development of the age groups being served by the personnel to be evaluated.
- * An option should be available for the person being evaluated to benefit from peer and student assessments of that person’s performance.
- * An option should be available for the person being evaluated to submit a self-evaluation or other information to be considered by the person conducting the evaluation.

SECTION IV

“STATE OF THE ART”

OF EVALUATION IN MASSACHUSETTS

I. Background

In January, 1980, the Commissioner of Education requested that each school district submit all of the evaluation materials used in its system for review by the Study Committee on Evaluation of Educational Personnel. By May, 94% of all superintendents had responded. In addition, the Committee received a sampling of teacher contracts in order to provide supplemental information related to evaluations.

The purpose of reviewing these evaluation procedures was two-fold: first, to describe the “state of the art” in evaluation throughout the Commonwealth and second, to identify “model” districts and procedures for closer analysis and attention.

Review of the evaluation materials centered on three areas:

1. General characteristics of evaluation systems
2. Characteristics of evaluation materials for teachers
3. Characteristics of evaluation materials for principals and supervisors

Questions were developed under each area, reflecting the principles of evaluation as adopted by the Committee and providing descriptive information about the various evaluation systems presently in use.

This report summarizes the evaluation materials as they relate to the principles of evaluation adopted by the Committee and then presents the results of the total findings in each area. Some general observations relating to the total analysis are also included. It should be noted that the information in this report is based on the written evaluation materials which each school district provided to comply with the Committee’s request. Districts may have other informal procedures which were not included in the written materials and were not, therefore, available for inclusion in this report.

II. Summary of Findings Related to Principles of Evaluation

The attached chart displays the principles which have been adopted by the Study Committee along with our related findings.

Definition of Evaluation:

Personnel evaluation is the process of defining goals and of identifying, gathering and using information as part of a process to improve professional performance and to judge total job effectiveness.

PRINCIPLES OF EVALUATION

Overview

- * The purposes of evaluation should be stated clearly, in writing, for all parties involved.
- * All parties involved in the evaluation process should discuss the evaluation criteria in order to promote mutual commitment to them.
- * Evaluation criteria should be based on the employee's job responsibilities, jointly developed goals, program objectives, and instructional priorities as they relate to student learning.
- * Evaluation assumes that standards of effectiveness can be determined and that performance can be measured in terms of those standards.

RELATED FINDINGS

The purpose of evaluation is usually stated. However, the stated purpose(s) and the actual use(s) of the evaluation data are sometimes in conflict.

A philosophical framework for evaluation is not generally an integral part of the evaluation materials. When it is included, it may vary from one line to several pages, from very general to very specific.

Joint goal-setting is not usually part of teacher evaluations. It is somewhat more likely to be part of administrator evaluation.

Evaluation criteria, for both teachers and administrators, are fairly consistent from one school system to another. However, systems differ greatly on the *order* of criteria listed on an evaluation form, which might imply a rank ordering which is either intentional or unintentional. For example, most evaluation instruments include professional preparation and presentation among the first item. Other districts list categories such as personal appearance, condition of classroom, and control of students as the first items.

Criteria for elementary teacher evaluations are most likely to focus on child development, rapport with students, and paperwork; secondary evaluations appear to emphasize subject matter competencies.

The processes of evaluation for non-tenured teachers appear to be more thorough and more carefully documented than the processes for tenured teachers. In a number of systems, it is unclear whether the process and evaluation instruments are used with both non-tenured and tenured teachers, or with only one group or the other. In general, most systems appear to have more complex and more carefully designed systems of evaluation for teachers than for administrators.

The total process involved in evaluation is seldom completely stated in writing for the benefit of all participants.

Most school systems provide a standard form as the final evaluation instrument. However, school districts which rely on mutual goal-setting are more likely to leave the design of the form to the discretion of the participants.

Data Gathering

- * Evaluation evidence must be either observed or otherwise documented.
- * Data for evaluation should be collected over a sufficient period of time and should be maintained in the official personnel file.
- * The evaluation process must be flexible enough to provide for differences in the context of staff member's assignment (characteristics of students, class size, characteristics of environment).
- * The evaluation process should allow the evaluatee to gather data in support of goal attainment and to provide individual self appraisal data on an optional basis.

Classroom observations are usually documented for teachers. Other sources for data are seldom specified, although they are implied in the evaluation criteria. Sources for gathering data are seldom mentioned in relation to administrator evaluations.

Conferences are seldom documented with data, signatures, and statement of content covered.

There is little evidence that the evaluation process is cumulative, i.e., that the recommendations of one evaluation are used as the basis for the next.

Data for evaluation are more likely to be collected over a period of time when there are both a pre-conference and a post-conference.

Few evaluation forms require the stating of information pertaining to number of students in classroom, time of day, day of week, or other circumstances which might influence teaching-learning environment.

Feedback Process

- * All evaluations should be communicated in writing to the persons being evaluated.
- * The evaluation process should provide recognition for positive performance as well as for inadequacies in performance.
- * The evaluation process should encourage creativity.

Final evaluation forms are usually signed by both the evaluator and the person being evaluated.

Evaluation format is usually a combination of narrative and rating scale.

Positive performance is a category listed on approximately one-half of the evaluation forms. Weaknesses are usually noted at the same time.

Implementation

- * Adequate provision for the protection of the rights of the evaluatee and evaluator shall underlie the evaluation process.

Evaluative data may be aggregated and used as a basis for assessing total job effectiveness.
- * The evaluation process should provide specific recommendations and concrete resources for improving professional performance and enhancing student learning.
- * Training in evaluation skills should be provided regularly to those charged with the responsibility for evaluation.

In most school districts, the entire process of evaluation, including time lines and responsibilities of participants, is not clearly stated in writing.

Evaluative data may be aggregated and used as a basis for assessing total job effectiveness.

Specific resources for improvement are seldom listed on the evaluation form, and there is usually no timeline for implementation of recommendations.

Approximately one-half the evaluation forms provide space for the person being evaluated to make comments.

Training for persons participating in the evaluation process is mentioned in only a very small percentage of school districts. No specific, on-going training programs were described as part of a district's evaluation system.

III. General Information About Evaluation Practices

A. Training of Evaluators

Question:	Does the school system provide training for any evaluators?		
Results from Data Submitted	No. of Districts		
	253	No, none indicated	
	18	Yes	
Analysis:	Training for evaluators is rarely mentioned in the materials submitted.		

B. Philosophy/Rationale

Question:	Does material submitted include a section describing the rationale or philosophy towards evaluation?		
Results from Data Submitted	No. of Districts		
	174	No,not indicated	
	97	Yes	
Analysis:	More than one-half of the districts include some rationale or philosophy underlying the evaluation process.		

C. Activity Surrounding Evaluation in School Districts

Question: How long has this evaluation system been in use?

Results from Data Submitted:	No. of Districts	
	177	Could not determine
	63	1-5 years in use
	17	just adopted (first year 1979-80)
	14	5-10 years in use
	4	in use more than 10 years

Analysis: Although this information was not provided by more than half of the districts, approximately 80 districts, or 30% have adopted their present evaluation system during the past five years.

Question 2: Is this system currently under review?

Results from Data Submitted	No. of Districts	
	232	No, not indicated
	39	Yes

Analysis: About 17% of the respondents indicated that their evaluation systems are currently under review. Some of these 17% are districts that have adopted new evaluation systems during the past five years and are continuing to review them. However, many are not part of that group, indicating considerable interest and activity in relation to evaluation throughout the state.

D. Kinds of Personnel Evaluated

Question 1: Which personnel did the system submit evaluation materials for?

Results from Data Submitted	No. of Districts	
	260	Teachers
	63	Other professional personnel (not including principal or superintendent)
	55	Principals

Analysis: Teachers are evaluated in all school systems. In some districts, non-tenured and tenured teachers are evaluated somewhat differently. In most cases, the major difference is that non-tenured teachers are usually evaluated several times in each year, while tenured teachers are usually evaluated only once a year or less.

While almost all school districts submitted materials describing teacher evaluation, only 55 districts submitted materials describing evaluation of principals, and 63 districts submitted materials for evaluation of other professional personnel such as counselors and department heads.

Question 2: What are the differences (if any) between the evaluation processes employed for tenured and non-tenured teachers?

Results from Data Submitted	No. of Districts	
	6	only non-tenured forms submitted
	2	only tenured forms submitted
	141	both non-tenured and tenured forms submitted
	103	can't determine which group or groups are evaluated
	6	other
	74	process is the same for tenured and non-tenured teachers
	55	process is different for tenured and non-tenured teachers
	34	different forms
	118	different frequency
	21	different evaluators
	34	different criteria
	124	can't determine whether process is different or the same

Analysis: Only about half of the submitted forms provide explicit differences between evaluations of tenured and non-tenured teachers. Most schools require a higher number of observations on non-tenured teachers than on tenured teachers, but 45% of the forms presently used give little or no indication whether there are different processes employed or not. Schools use varying forms for each category.

E. Systems which did not submit Evaluation Materials

Belchertown
 Clarksburg
 Lanesborough
 New Salem - Wendell
 Bristol Plymouth

IV. Review of Teacher Evaluation Materials

The information about teacher evaluations comes from two sources: evaluation materials submitted by each school district and a random sample of teacher contracts. The review of school district materials will be presented first. In all cases the review represents the process used for tenured teachers.

A. Data Obtained from School Districts

1. Participants in Teacher Evaluation

Question: Who evaluates teachers?

Results from Data Submitted	No. of Districts	
	159	Principals
	135	Other administrators
	52	Self
	12	Other teachers
	4	Students

Analysis: Principals or other administrators usually have responsibility for evaluating teachers. About 20% of school districts also include some form of self-evaluation.

2. Purpose/Use of Evaluation

Question: What is the use of the evaluation?

Results from Data Submitted	No. of Districts	
	162	Same evaluation is used for both improved performance and continued employment
	42	Use is not specified in materials
	30	Improved performance only
	19	Continued employment only (to recommend tenure, reappointment, promotion)

Analysis: Evaluations are usually used both for improving performance and making decisions about continuing employment, and the same process, personnel and forms are usually used for both purposes. In only a small number of districts was there a single purpose for evaluation.

3. Joint Goal Development

Question: Are the goals of the evaluation developed jointly with the evaluator and person being evaluated?

Results from Data Submitted	No. of Districts	
	189	No
	82	Yes

Analysis: In one-third of the school districts there is some form of joint goal development occurring between evaluator and teacher.

4. Cumulative Process

Question: Is the evaluation a cumulative process, building each new evaluation on recommendations from preceding ones

Results from Data Submitted	No. of Districts	
	166	No
	88	Yes

Analysis: In one-third of the districts there was evidence that evaluations were continuous, where the results of one were followed up in the next evaluation. There was little evidence that the strengths and weaknesses identified in one evaluation were used as the foundation for the next evaluation in order to provide a measure of the teacher's growth.

5. Data Gathering—Methods

Question 1: What methods are used to gather information to be used in the evaluation process?

Results from Data Submitted	No. of Districts	
	223	Observation in the classroom
	196	Conference
	114	Observation out of the classroom
	26	Other

Analysis: Evaluations are primarily based on classroom observations and conferences. Categories of information were often listed which could not be obtained through classroom observation, such as professional development and staff relationships; but sources of obtaining this information were seldom specified.

Question 2: If conferences occur, how many times do they occur in relation to one evaluation?

Results from Data Submitted	No. of Districts	
	95	Both before and after evaluation
	85	Once after evaluation
	64	Could not determine
	23	Other
	4	Once before evaluation

Analysis: In 35% of the districts, conferences between evaluator and teacher are held both before and after evaluation. It is also common to have only one conference at the end of the evaluation. In many cases it was not clear whether or not a conference was required as part of the evaluation process.

6. Data Gathering—Documentation

Question 1: If classroom observations are made, is the record signed and dated by the evaluator?

Results from Data Submitted	No. of Districts	
	152	Yes
	68	No

Analysis: Classroom observations are usually recorded, with the date and signature of the evaluator. In many districts there is no separate classroom observation form. Instead, the final evaluation form incorporates all of the material gathered in relation to the evaluation.

Question 2: If conferences occur, is there a record of the conference, including date and signatures?

Results from Data Submitted:	No. of Districts	
	172	No
	99	Yes

Analysis: In the majority of cases, there is no written record of conferences between evaluator and teacher. Where there is a notation regarding a conference, it is usually part of the final evaluation form, rather than being a separate form.

7. Data Gathering—Content

Question 1: What categories are included on the classroom observation form?

Results from Data Submitted	No. of Districts	
	153	Preparation
	147	Presentation of subject matter
	139	Rapport with students
	137	Control (classroom management)
	116	Physical appearance of the classroom
	115	Appearance of Teacher
	52	Other

Analysis: The material found in classroom observation forms includes a fairly standardized list of categories. The *order* of categories on the evaluation form and the number of subheadings in each category tends to give more importance to some categories over others.

Question 2: What items are included in the total evaluation?

Results from Data Submitted	No. of Districts	
	230	Instructional—preparation
	197	Rapport with students
	188	Instructional—control (classroom management)
	168	Personal qualities
	165	Instructional—presentation of material
	159	Professionalism
	151	Staff relationships
	97	Other significant
	74	Maintenance of classroom
	59	Consistency with prescribed curriculum
	8	Leadership

Analysis: The categories in final evaluation instruments also are fairly standardized. Again, the order and depth of information varies greatly from one school district to another.

8. Follow-Up/Feedback Procedures—Written Materials

Question: Whose signatures are on the final evaluation form?

Results from Data Submitted	No. of Districts	
	229	Both evaluator and teacher
	27	Could not determine
	9	Teacher only
	5	Neither teacher nor evaluator
	1	Evaluator only

Analysis: Teachers and evaluators both sign the final evaluation form in most cases.

9. Follow-Up/Feedback Procedure—Final Form

Question: What is the form of the final evaluation instrument?

Results from Data Submitted:	No. of Districts	
	103	Combination of narrative and rating scale
	75	Narrative only
	32	Rating scale only
	24	Could not determine
	18	Narrative and short question and answer
	12	Combination of question and answer, narrative, and rating scale.

Analysis: A combination of rating scale and narrative is the most common form of final evaluation instrument. The narrative style alone is also common.

10. Follow-Up/Feedback—Type of Feedback

Question: Which kinds of feedback occur in the evaluation process?

Results from Data Submitted	No. of Districts	
	151	Teacher is given a space on the form to write a reply
	149	Weaknesses are noted
	145	Areas of positive performance are noted
	53	Space is provided for noting specific resources for improvement

Analysis: More than one-half of the plans provide a space for recognition of positive performance and listing of specific weaknesses. There was little evidence of specific resources and help for improvement of performance. Concrete helps such as listing of resource people or materials, pairing of a teacher with an experienced teacher for a period of time with specific goals, a timetable of further observations and help sessions prior to the next evaluation, courses to enroll in, etc. were seldom given, and these kinds of suggestions were seldom included in instructions to evaluators. Fifty-six percent of the districts provide space for, or suggest, a written reply from the teacher.

B. Teacher Contracts

The second source of information about teacher evaluation practices is the following summary of teacher evaluation clauses stated in a random sample of thirty-four (34) contracts supplied by the Massachusetts Teacher Association and the Massachusetts Federation of Teachers.

The clauses were itemized according to the number of times they occurred in the different contracts. Some items are copied from individual contracts, because they are stated in the language most commonly employed. Some interesting items that were less frequently used (four times or less) are listed under item fourteen through twenty-six.

Items:

- Item 1: All formal observations of the work performance of a teacher will be conducted openly with full knowledge of the teacher. (28)
- Item 2: Teachers have the right, upon written request, to review the contents of their personnel file, excluding (various reasons). A teacher will be entitled to have a representative of the Association accompany him during such a review. (28)
- Item 3: No material derogatory to a teachers conduct, service, character or personality arising during the course of his employment will be placed in his personnel file unless the teacher has had an opportunity to review such material. The teacher will acknowledge that he has had the opportunity to review such material by affixing his signature to the copy to be filed with the express understanding that such signature does in no way indicate agreement with the contents thereof.(28)

- Item 4: The teacher has the right to submit a written answer to such material and his answer to such material shall be reviewed by the Superintendent, and attached to the file copy. (26)
- Item 5: All persons evaluated shall receive a copy from the primary evaluator of any and all evaluation reports regardless of who compiled or contributed to the report. (23)
- Item 6: . . . the teacher will have the right to discuss the report with their superiors. (19)
- Item 7: The Association recognizes the authority and responsibility of the principal, the director, department head, supervisor or other administrator (or any given selection, often including the Superintendent) for disciplining or reprimanding a teacher for delinquency or professional performance. Before any disciplinary action or reprimand becomes part of the personnel file, the teacher will be notified of the nature of the discipline or reprimand at least twenty-four hours (time limits vary) prior to the meeting to discuss the matter. The teacher will be entitled to have a representative of the Association present. (17)
- Item 8: Statements of philosophy and/or purpose of the evaluations. (14)
- Item 9: Various provisions for tenured/non-tenured teacher evaluation (different criteria, various numbers of visits, etc.) (13)
- Item 10: Any “serious” complaints regarding a teacher made to any member of the administration by any parent, student, or other person will be promptly called to the attention of the teacher (12)
- Item 11: No teacher shall be disciplined, reprimanded, reduced in rank or compensation, separated or discharged, or deprived of any professional advantage without just and sufficient cause. (12)
- Item 12: The Association agrees that in the event of suspensions or discharge of a teacher, compliance by the Committee with the various steps and provisions of the Grievance Procedure contained in this agreement shall constitute full satisfaction of the provisions of the General Laws. . . (8)
- Item 13: The use of the public address system, or any other audio devices shall be strictly prohibited as an evaluation device. (6)

Items that occurred four times or less

- Item 14: Various reappointment procedures.
- Item 15: Specific guidelines for evaluation (criteria, number of visits, formal/informal evaluations etc.)
- Item 16: Every teacher gets one (or more) folder.
- Item 17: No recording via audio and/or video tape shall be done without advanced notification and consent (written) by the teacher.
- Item 18: No teacher shall receive adverse comments from any observer in the presence of pupils.
- Item 19: Access-to-the-file provisions for persons other than the teacher.

- Item 20: Specific guidelines for the Committee to deal with the Association.
- Item 21: Specified contents of a teacher's file.
- Item 22: Teacher has to notify evaluator of lesson content.
- Item 23: Specific salary provisions relating to the evaluation process.
- Item 24: Teacher has the right to request a reevaluation.
- Item 25: Teachers cannot be required to evaluate other teachers, or be evaluated by other teachers.
- Item 26: Committee representatives meet on a regular basis to review and/or revise evaluation forms and criteria.

V. Review of Principal Evaluations

All of the information about evaluation of principals came from materials submitted by school districts. Of the 271 school districts which submitted information about teacher evaluations, only 55 systems submitted materials for principal evaluations. Because of this small sample, the value of the information is somewhat limited.

A. Participants in Principal Evaluation

Question: Who evaluates principals?

Results from Data Submitted	No. of Districts	
	23	Administrators other than superintendent
	15	Superintendent
	14	Self
	4	Other principals
	1	Students
	7	Could not determine

Analysis: The responsibility for evaluating principals is distributed among the superintendent, other administrators and the principal. In a significant number of cases, the evaluator was not clearly designated.

B. Joint Goal Development

Question: Are the goals of the evaluation developed jointly with the principal and evaluator?

Results from Data Submitted	No. of Districts	
	26	No
	25	Yes
	4	Could not determine

Analysis: About half of the evaluations of principals indicate some kind of joint goal-setting.

C. Cumulative Process

Questions: Is the evaluation of principals a cumulative process, one which builds on the data from previous evaluations?

Results from Data Submitted:	No. of Districts	
	36	Yes
	15	No

Analysis: Most evaluations of principals appeared to be cumulative, to the extent of mutually defining specific goals or extending planning over a period of more than one year.

D. Data Gathering—Method

Question: What methods are used to gather data for evaluations?

Results from Data Submitted	No. of Districts	
	33	Both observations and conferences
	15	Could not determine
	3	Conference only
	2	Other
	1	Observation only

Analysis: The most common method of evaluation of principals appears to be combination of observation and conference. The observations of principals are usually informal and on-going rather than formal sessions. In most cases, the sources of data were not clearly specified.

Question 2: If conferences are held, when do they occur?

Results from Data Submitted	No. of Districts	
	16	Once after evaluation
	14	Once before and after evaluation
	6	Could not determine

Analysis: Of the systems reporting, about one-half hold conferences at the end of evaluation, and the others hold conferences both before and after evaluation. Conferences held before the evaluation are always followed up by a conference after evaluation, unlike the teacher conferences.

E. Data Gathering—Documentation

Question 1: If observations of performance are done, is there a written record which includes date of the observation and signatures of participants?

Results from	No. of	
Data Submitted	Districts	
	6	Yes
	49	No

Analysis: Records of observations of principals are not usually recorded.

Question 2: If conferences occur, is there a form which includes the date of conference and signatures of participants?

Results from	No. of	
Data Submitted	Districts	
	24	No
	23	Yes

Analysis: Approximately one-half the systems require recording of conferences, including date and signatures of participants. In most of these cases, the conference dates are recorded only on the final observation form, rather than there being a separate conference form.

F. Data Gathering—Content

Question: What categories are included in evaluation of principals?

Results from	No. of	
Data Submitted	Districts	
	51	Administration
	46	Rapport with staff
	43	Professionalism
	41	Leadership
	39	Maintenance, management of building
	38	Personal qualities
	37	Rapport with students
	34	Budget management
	14	Other significant

Analysis: For the categories listed, evaluations of principals contain many of the same items from district to district. Self-evaluations offered the most varied content.

G. Follow-Up/Feedback Procedures—Written Materials

Question: Who signs the final evaluation form?

Results from Data submitted:	No. of Districts	
	50	Both principal and evaluator
	1	Neither participant
	4	Could not determine

Analysis: In most cases, final evaluation forms contain signatures of both principal and evaluator.

H. Follow-Up/Feedback Procedure—Final Form

Question: What is the form of the final evaluation instrument?

Results from Data Submitted	No. of Districts	
	35	Combination of narrative, rating scale, and short question and answer
	10	Narrative
	4	Could not determine
	3	Rating scale
	3	Short question and answer

Analysis: The final evaluation form for principals is usually narrative, often including a rating scale, or a section requiring short answers, to provide additional information.

I. Follow—Up/Feedback Procedure—Type of Feedback Provided

Question: What follow-up procedures are used?

Results from Data Submitted	No. of Districts	
	47	Weaknesses are noted
	46	Areas of positive performance are noted
	37	Principal is given a space on the form to write a reply
	14	Specific resources for improvement are noted
	8	Other

Analysis: Strengths and weaknesses are usually stated, but there is seldom a clear procedure for implementing recommendations.

VI. Other General Observations about Evaluation Materials Submitted by Systems

- A. Very few school systems submitted a package of evaluation materials which included detailed information about process, participants, and relationship of evaluation to other activities within the school system. Because the materials submitted were often incomplete, this review may be in error at some points.
- B. Some of the evaluation plans which indicated the most careful thought and clear understanding of the total process buried themselves in forms in triplicate and quadruplicate, which may tend to discourage creativity, spontaneity, and even participation in the process.
- C. It appears that the art of teacher evaluation has been more highly developed than the art of administrator evaluation.
- D. Self-evaluation forms are sometimes included as optional for teachers. However, they usually are not part of the final evaluation record.
- E. While most evaluations state that improved performance is the primary goal of evaluation, it is often unclear how, or in what time frame, the improvement is to take place.
- F. There was little mention of the various ways of collecting data, such as community feedback, student achievement and attitudes towards teachers, informal observations, informal feedback from other administrators and staff members, and observation of teacher's participation in out-of-classroom activities.

SECTION V

ILLUSTRATIVE PRACTICES

This section provides examples selected by members of the Study Committee. The sample represents practices which have been used successfully by local school districts and might be adapted. The examples were chosen to assist local school districts as they review or revise their evaluation systems. The inclusion of a particular selection does not imply that the Study Committee endorses the entire plan of the district. The examples are to indicate the ways in which some districts have approached the problem and some resources which may be utilized in developing evaluation procedures. The examples are grouped in the order listed below.

OVERVIEW (p. 29)

Statement of philosophy of evaluation	Clark County, Nevada (p. 29)
Statement of evaluation philosophy	Lincoln, Nebraska (p. 29)
Statement of introduction and philosophy of evaluation	Wake County, North Carolina (p. 30)
Purpose of administrative evaluation	Lake Washington, Washington (p. 31)
Purpose of evaluation	Salem, Oregon (p. 31)
Purpose of administrative evaluation	Maynard, Massachusetts (p. 32)
Educational competencies for teachers and administrators	Salem, Oregon (p.32)
Basic Evaluation Criteria for Teachers Counselors Administrators	Westport, Connecticut (p. 38)
Criteria for Professional Evaluation	Wayland, Massachusetts (p. 42)

DATA GATHERING (p. 44)

Administrative Check List for Self Appraisal	Cambridge, Massachusetts (p. 45)
Self-Assessment Forms	Watertown, Massachusetts (p. 47)
Self-Evaluation Description and Form	West Hartford, Connecticut (p. 48)
Classroom Observation Forms	Longmeadow, Massachusetts (p. 51)
Teaching Performance Scale	Andover, Massachusetts (p. 54)
Administrative Goal Setting Agreement	Cambridge, Massachusetts (p. 60)
Administrative Evaluation Forms	Cambridge, Massachusetts (p. 62)
Evaluation of Supervisor	Brookline, Massachusetts (p. 68)

Student Evaluation of Teacher Forms
 Parent Comment Sheet
 Personnel File Policy
 Chart of Teacher Evaluation Process

Wake County, North Carolina (p. 71)
 Brookline, Massachusetts (p. 75)
 Walpole, Massachusetts (p. 76)
 Norwalk, Connecticut (p. 77)

FEEDBACK PROCESS (p. 78)

Techniques of Evaluation
 Suggestions for Supervisor-Recording Data
 Pre-Observation Agreement—for all Staff
 Data Collection Form—for all Staff
 Observation Report—for all Staff
 Conference Form—for all Staff
 Summative Evaluation Report—for all Staff
 Teacher's Professional Growth Plan
 Administrator's Professional Growth Plan
 Superintendent's Appraisal Check List
 Role and Evaluation of Elementary School Principal
 Evaluation for Guidance Counselors

 Specialist Conference Record
 Evaluation Expectations—Teachers & Evaluators
 Staff Feed Back to Supervisors
 Policy on Administrative Evaluation
 Principal's & Teacher's Evaluation System Flow Charts

Wellesley, Massachusetts (p. 78)
 Quincy, Massachusetts (p. 79)
 Quincy, Massachusetts (p. 80)
 Quincy, Massachusetts (p. 82)
 Quincy, Massachusetts (p. 84)
 Quincy, Massachusetts (p. 86)
 Quincy, Massachusetts (p. 87)
 Quincy, Massachusetts (p. 90)
 Quincy, Massachusetts (p. 92)
 Longmeadow, Massachusetts (p. 94)
 Stoughton, Massachusetts (p. 101)
 North Shore Regional
 Vocational School District (p. 106)
 Watertown, Massachusetts (p. 112)
 Waltham, Massachusetts (p. 117)
 Cambridge, Massachusetts (p. 118)
 Maynard, Massachusetts (p. 124)
 Wake County, North Carolina (p. 125)

IMPLEMENTATION (p. 127)

Organizational Structure for Supervision
 Appeal Process in Teacher Evaluation
 Policy on Administrative Evaluation
 Adjustment Process for Teachers
 Recourse Procedures for all Staff
 Appraisal Process
 Number and Dates of Evaluation
 Yearly Evaluation Cycle for Teacher Evaluation
 Staff Evaluation Process

 Phases of Teacher Evaluation

Quincy, Massachusetts (p. 128)
 Waltham, Massachusetts (p. 131)
 Maynard, Massachusetts (p. 131)
 Norwalk, Connecticut (p. 132)
 Quincy, Massachusetts (p. 133)
 Auburn, Massachusetts (p. 135)
 Westwood, Massachusetts (p. 136)
 Meriden, Connecticut (p. 137)
 Southern Berkshire Regional
 School District (p. 138)
 Barnstable, Massachusetts (p. 141)

Any school district desiring to reproduce any of the examples should seek the permission of the district cited.

Overview

- * The purposes of evaluation should be stated clearly, in writing, for all parties involved.
- * All parties involved in the evaluation process should discuss the evaluation criteria in order to promote mutual commitment to them.
- * Evaluation criteria should be based on the employee's job responsibilities, jointly developed goals, local goals, program objectives, and instructional priorities as they relate to student learning.
- * Evaluation assumes that standards of effectiveness can be determined and that performance can be measured in terms of those standards.

CLARK COUNTY SCHOOL DISTRICT LAS VEGAS, NEVADA

PHILOSOPHY

The purpose of supervision and evaluation is to improve instruction, reinforce good teaching, reinforce progress toward goals and objectives, and when necessary, document ineffectiveness. These ends can best be achieved through frequent observations to directly observe the instructional program followed by conferences between employee and supervisors. (Policies 4160, 4760, 6120, and 6140—see Appendix)

An effective supervision and evaluation system must contain as its framework, observable-measurable performance evaluation criteria uniformly applied throughout the Clark County School District. To totally facilitate the intent of supervision and evaluation, employees should be involved in the processes through self evaluation and subsequent goal setting. (Policies 6120, 6140, and 2510—see Appendix)



LINCOLN, NEBRASKA PHILOSOPHY

Overview

The purpose of appraisal is to help people grow. Building administrators, department chairs, team leaders and consultants can and should be an integral part of the appraisal process. Peer and student input can also be useful. The relationship between appraiser and appraisee should be based upon mutual trust and acceptance. It must build genuine confidence, develop personal integrity and serve to enhance the self-respect of the professional employee.

Appraisal is a continuous process based upon professional development. Only when the performance of an individual is less than satisfactory do we seek remediation through due process.

Appraisal is a joint effort, in other words, a partnership for growth. In this school district the professional employee must help identify their job targets for growth to occur. Human beings want to help plan and create their own future. That ownership is essential in order to insure commitment to change.

Building administrators, team leaders, department chairs have a responsibility to know each employee—his/her interests, needs and professional endeavors. These staff members must make the appraisee aware of their concerns as well as their support for the achievements of that individual. Employees must know that they are needed and appreciated. They respond to sincere praise and involvement.

Job targets must, in part, be related to department, team, building and/or district goals and also the acquiring of skills necessary to accomplish those goals. Support for the attainment of goals must come from the Staff Development and Instructional Offices.



WAKE COUNTY PUBLIC SCHOOLS (NORTH CAROLINA)

EVALUATION SYSTEM

Introduction

For too many years, the concept of evaluation has implied a sense of fear, dread, and professional foreboding. It is hoped that through this document the professional staff of Wake County will assist in implementing an evaluation system based on help-giving, professional growth, and mutual trust. While such idealistic words are often greeted with sneers of derision and cynicism, one cannot build trust unless the parties concerned understand the issues. Evaluation is one such issue.

PHILOSOPHY

The Wake County School System recently received a Task Force report on a revised evaluation system for the County. The Task Force was composed of teachers, principals, the Director of Instructional Personnel, and was assisted by two consultants from Appalachian State University. The essence of that report was that evaluation needs to be built on open communication, mutual participation, and the view that the overriding purpose of any evaluation scheme, system, instruments, or processes had to benefit the individual being evaluated and his/her clients. The system that follows is indeed predicated on the following basic principles.

1. Effective evaluation is based on mutually agreed upon goals and objectives between evaluator and evaluatee.
2. The use of evaluative data must be geared to improving the staff member's ability to achieve those goals and objectives.
3. Any evaluative system must give praise as well as suggestions for improvement. The absence of criticism cannot be construed as praise.
4. The flow of evaluation need not be in one direction (down) only, but should utilize feedback from peers and subordinates as well.
5. The system of evaluation must facilitate face-to-face communication.
6. Self-evaluation must be a part of the total framework, and must be listened to and treated as valid.

LAKE WASHINGTON SCHOOL DISTRICT, WASHINGTON

On February 5, 1973, the Lake Washington School District Number 414 in Kirkland, Washington, adopted a revised policy statement regarding the evaluation of the performance of its administrators. The purpose of that effort was, to establish an evaluation system which would improve the quality of instruction by:

1. Strengthening positive motivation through recognition of performance and accomplishment.
2. Providing an understanding of the administrator's assignment and major performance areas.
3. Fostering communications on performance through multi-level evaluation and review.
4. Establishing documented performance as a decision base for personnel actions.
5. Insuring the compatability of administrator objectives and District goals.



Salem Oregon Public Schools

Introductory Statement

Instructional improvement occurs in rather direct relationship to the development of staff competencies. This concept is valid because teachers and administrators determine the quality and process of instruction.

Establishment of this philosophical premise was important because it pointed to a people-focused program, rather than exclusively to a process-oriented one. It reaffirmed the conviction that programs, functions and instructional materials are subordinate to the human beings involved.

The professional educators of Salem should accept the role of fostering learning skills and significant subject matter essential to human progress. The profession should fulfill its role through excellence in teaching.

Professional educators should recognize the supreme importance of the individual growth of all students and the promotion of democratic citizenship. They should regard as essential to their goals the protection of freedom to learn and to teach, and equal educational opportunity for all. The teaching profession should affirm and accept its responsibility for the highest standards of competent and ethical performance.

The professional educator, through commitment and action, should exert every effort to raise educational standards, to improve service, and to achieve the conditions and a profession worthy of trust.

The terms "supervision" and "evaluation" need no longer to be viewed as words designating programs with ultimate ends of their own, but should assume their proper roles as terms to describe correlative processes employed to assist in promoting staff competencies and professional growth.

THE MAJOR PURPOSE OF THE PROFESSIONAL GROWTH AND EVALUATION PROGRAM IS TO IMPROVE INSTRUCTION THROUGH THE UPGRADING OF TEACHER PERFORMANCE.

Accountability in Education.

The professional educator has an obligation to hold himself to account for the tasks with which he has been charged. This statement on accountability is intended to acquaint staff members with the essentials of accountability, so that they may structure their objectives and performance appropriately.

In order to apply the concept of accountability in the field of education, it is suggested that certain components must be present. There must be *measurable objectives* in terms of out-put or pupil behavior, what the pupil should learn or become able to do. The second component consists of a *program*, usually a learning program, designed to lead to the achievement of these measurable behavioral objectives. The third is the *evaluation* of the achievement of these objectives which determine how successfully they have been realized plus an assessment of the cost of the program. The fourth component is a systematic method of *feedback* to the ultimate decision makers, or those to whom the school personnel are accountable, so that appropriate revisions in the program may be made to improve future pupil performance. The innovative element is the combining of all these tasks into a unified whole or into what may be called a systems approach to education. Because this approach is an integrated one, the contention is that it promotes more efficient planning and carrying out of an educational program.

In addition to the above necessary components, any implementation of the concept of accountability usually includes certain conditions, such as specified hours of pupil exposure to the instructional program, a specified time limit in which objectives are to be met, as well as a defined target group of pupils. Therefore, there must be evidence of achievement of stated objectives for a particular group of students using clearly identified procedures over a specified period of time.



Maynard, Massachusetts

Section 1.

It is the objective of the School Committee and the Association to:

- a) Attract and retain the best administrators
- b) Recognize high quality performance of professional educators
- c) Encourage continued professional growth

Section 2.

A fair equitable evaluation procedure is fundamental to meeting the above objectives. In the interests of improving professional evaluation a representative committee of the administrators will be established and continued (when necessary) as a means of improving the criteria procedures and evaluation instrument of methods used for the evaluation of administrators.

It will be this evaluation committee's responsibility to recommend those improvements in both the criteria and evaluation instrument that are to be considered for adoption.



Educational Competencies. Salem Oregon Public Schools

Educational goals are direct outgrowths of standards of competency. Competent educators will strive to achieve many objectives. Although educational standards may well be so numerous that it is futile to enumerate them, the following outline details some of them. The following categories represent major instructional procedures.

A. Instructional Objectives

The teacher who is competent will:

1. Establish appropriate instructional objectives and relate them to the individual pupil needs and aspirations.
2. Specify changes in the learner's behavior which give evidence that learning has occurred.
3. Utilize individual student interest and abilities when planning and implementing instruction.
4. Write short and long-term objectives for any assigned class or other professional assignment.

The administrator who is competent will:

1. Establish appropriate instructional objectives and relate these to the individual teacher and/or pupil needs and aspirations.
2. Provide the materials and facilities necessary for the teacher to accomplish the instructional objectives.
3. Establish management techniques that utilize staff personnel for the best interest of the student.

B. Instructional Program

The teacher who is competent will:

1. Plan lessons in light of student performance.
2. Plan for individual differences of students.
3. Identify the student and teacher behavior essential for successful attainment of instructional objectives.
4. Provide for student participation in program planning.
5. Determine activities essential to attainment of objectives.
6. Use resources appropriate to the objectives and activities.
7. Use instructional procedures appropriate to the task to be performed.
8. Vary the activities within the lesson employed to achieve objectives.
9. Provide alternatives within the activities planned.
10. Make resources and materials available to students.

The administrator who is competent will:

1. Plan programs to meet individual differences of students and staff.
2. Identify the student and teacher behaviors essential for successful attainment of instructional objectives.
3. Provide for student and staff participation in program planning.
4. Determine activities and operational policies essential to attainment of objectives.
5. Make appropriate resources available for program implementation.
6. Use communications media as needed to effect program objectives.
7. Create and maintain healthy instructional climate.
8. Plan subsequent instructional program modification based on evaluative data.
9. Assign roles and tasks in keeping with individual abilities and specialties.
10. Assist staff members and students in attainment of success.

11. Use language and other communications media in keeping with the group and/or individual(s).
12. Encourage honest, free, and clear communication of ideas and feelings.
13. Create and maintain healthy educational climate.
14. Adjust instruction to meet needs of individual students.
15. Help students to choose appropriate lesson attack strategies.
16. Plan subsequent instruction and program modification based on evaluative criteria and data.
17. Assign roles and tasks in keeping with individual abilities and specialties.
18. Help each individual to experience success.

11. Encourage each individual to express ideas and feelings openly and clearly.

C. Instructional Strategy

The teacher who is competent will:

1. Use strategies and learning activities that are appropriate to attain objectives.
2. Solicit and use student suggestions when feasible.
3. Employ a variety of strategies—questioning, inquiry, exploration, discovery, research, etc.
4. Develop alternative strategies to accommodate individual differences in age, ability, and interests.
5. Select strategies to foster balanced growth in levels of thinking—recall, comparison and contrast, classification, interpretation, analysis, synthesis, and evaluation
6. Select and justify strategies in terms of kinds of learning involved, principles of learning, learner characteristics, and relevance to learner.

The administrator who is competent will:

1. Prevent and resolve discipline and learning problems in accordance with school law, state board regulations, school board policy, and accepted school policies.
2. Provide leadership in developing and implementing sound instructional strategies.

D. Learning Environment

The teacher who is competent will:

1. Be a model for students to emulate in matters such as consistency, temperament, qualities of order, and vocal restraint.
2. Establish, with student assistance, ground rules for implementation of the activity, in keeping with objectives to be achieved.
3. Provide for appropriate “enrichment” activities for students who finish activity early and who have special needs.

The administrator who is competent will:

1. Be a model for students and staff to emulate in matters such as consistency, temperament, qualities of order, vocal control and restraint.
2. Establish, with staff and student assistance, ground rules for conduct of school activities.
3. Protect the rights of students and staff to perform their tasks free of undue interference from others.
4. Deploy personnel, materials, and equipment to maintain a favorable learning environment.
5. Use management skills designed to improve learning environment.

E. Human Relationships

The educator who is competent will:

1. Assist others to arrive at individual views and to express them.
2. Accept others as worthy human beings.
3. Offer constructive criticism as needed.
4. Comply with reasonable requests by others in proper authority.
5. Assign reasonable tasks for performance of others.
6. Use effective interpersonal relations skills.
7. Contribute as a member of a group, permitting and assisting others to do the same.
8. Assist co-workers in the performance of their tasks, based on need and request.
9. Accept group decisions.

F. Professional Preparation

The educator who is competent will:

1. Keep abreast of developments in his field and of innovative practices in the art of teaching.
2. Possess knowledge consistent with professional preparation.

3. Employ total personal resources in employment of tasks—training, experience, and special individual talents and creativity.
4. Possess organizational skills essential to establishment of educational environment conducive to learning.

G. Evaluation Teaching Performance:

The teacher who is competent will:

1. List techniques used in analyzing performance—student feed-back, videotape, etc.
2. Demonstrate use of student feed-back in the analysis of teaching performance.
3. List outside resources employed in evaluation of teacher performance.
4. Use performance goals in evaluation and instructional improvement.
5. Change, based on analysis of evaluative feed-back.
6. Relate teaching performance to student performance, the extent to which students attained objectives.
7. Employ variety of evaluative techniques in assessing teacher performance.
8. Keep abreast of innovative assessment practices.

The administrator who is competent will:

1. Recognize and make available evaluative techniques and instruments appropriate to educational objectives to be attained.
2. Provide for appropriate in-service as needed in use and interpretation of evaluative instruments and techniques.
3. Keep abreast of innovative assessment practices.
4. Devise and implement meaningful procedures to measure effectiveness of the District's educational objectives and/or instructional programs.
5. Stand alert to abuses of evaluation, analyze validity of evaluative instruments, and conditions of administration; recognize that evaluation should promote individual educational progress.

Student Performance:

The teacher who is competent will:

1. Employ a variety of evaluative techniques in assessing student performance.
2. Select evaluative techniques compatible with students, material objectives, and learning to be measured.
3. List outside resources, if any, employed in evaluation of student performance.

4. Provide for student self-evaluation.
5. Employ teacher-made evaluative instruments to measure student progress.
6. Provide students with frequent progress checks and subsequent feed-back.
7. Assist students with long range goals and self-evaluation in attainment of goals.
8. Build toward student independence in areas of evaluation and self-direction.
9. Evaluate only to attain specific objectives; avoid evaluation for sake of evaluation.
10. Keep abreast of innovative evaluation practices.

H. School and Community

The educator who is competent will:

1. Deal openly and tactfully with parents and other adults in the community.
2. Respond to parental inquiries promptly, honestly, and discreetly.
3. Interpret objectives of the school system to the community at large.
4. Enforce school law and District, building, and administrative policies.
5. Respect the role of community agencies and groups as they relate to the school; cooperate with them as appropriate.
6. Use educational facilities only as prescribed by school board policy, law and regulation.
7. Be involved in responsible community action.
8. Be a model of ethical behavior toward colleagues and in relationship with others in the community.

I. Non-Instructional Tasks

The teacher who is competent will:

1. Keep accurate required records.
2. Keep abreast of and adhere to the policies of the District.
3. Maintain skills necessary to perform designated tasks.

The administrator who is competent will:

1. Take appropriate action to resolve personnel problems.
2. Assume leadership in policy development, in cooperation with the teaching staff.
3. Assist in implementation of prescribed curriculum.

- | | |
|--|---|
| <ol style="list-style-type: none"> 4. Be consistent in classroom management practices. 5. Perform competently any reasonable assigned tasks. | <ol style="list-style-type: none"> 4. Communicate appropriately, using several media, with pupils, teachers, and the public. 5. Keep accurate required records. 6. Adhere to District policies. 7. Perform competently any properly designated tasks. |
|--|---|

J. Personal Requirements

The educator who is competent will:

1. Be physically and mentally able to perform designated tasks.
2. Possess effective communication ability and skill.
3. Exercise emotional constraint under pressure.
4. Demonstrate sufficient intellectual ability to perform designated tasks.
5. Be neat, clean, and appropriately attired.



BASIC EVALUATION CRITERIA FOR TEACHERS IN THE WESTPORT SCHOOL SYSTEM

The four major categories listed here are general descriptions of the primary areas of concern regarding effective teaching. The basic evaluation criteria within each category are to be used by the staff member and supervisor as a guide in developing a common understanding of effective role performance. It must be recognized that any personnel evaluation, even though it stems from factual data, must, in the final analysis, be subjective. The nub of the matter, therefore, is to focus intelligent, informed and experienced judgment on individual performances in these areas, followed by explicit goal setting that leads toward expanding strengths and eliminating weaknesses.

I. Effectiveness in the Classroom

1. Selects and applies appropriate learning objectives in his grade level or subject area.
2. Presents sequential learning experiences through related short and long range planning.
3. Varies instructional methods and instructional materials to suit the topics and students.
4. Maintains a physical and psychological environment that motivates and facilitates learning.
5. Applies evaluation measures that specify what students have learned, where students understand how they are being evaluated.

II. Effectiveness as a Faculty Member

1. Works cooperatively with staff members toward attaining the goals accepted for that building or department.
2. Applies purposeful dissent to seeking and developing improved learning experiences for students.
3. Complies with school regulations regarding tardiness, meetings and committees, and reports.

III. Effectiveness with Parents and Community

1. Communicates the intent of programs and progress of individual students to parents.
2. Takes appropriate action regarding parents' requests, comments and criticisms.

IV. Effectiveness within the Teaching Profession

1. Takes personal responsibility for individual professional growth.
2. Is informed regarding the aims and activities of professional organizations.

BASIC EVALUATION CRITERIA FOR WESTPORT COUNSELORS

The four major categories listed here are general descriptions of the primary areas of concern regarding effective counseling. The basic evaluation criteria within each category are to be used by counselor and supervisor as a guide in developing a common understanding of effective role performance. It must be recognized that any personnel evaluation, even though it stems from factual data, must, in the final analysis, be subjective. The nub of the matter, therefore, is to focus intelligent, informed and experienced judgment on individual performances in these areas, followed by explicit goal setting that leads toward expanding strengths and eliminating weaknesses.

I. With Students

1. Assists in the planning and development of educational programs appropriate to the individual needs of both typical and atypical students.
2. Provides students with the opportunity for appropriate academic and/or personal counseling individually, or in small groups.
3. Selects and administers appropriate individual and group tests and evaluative techniques to assess pupil achievement, ability, and development.
4. Selects and provides students with appropriate guidance information to help them in their personal, educational and vocational decision making.

II. With Staff

1. Works cooperatively with staff to plan, develop, and implement mutual educational and professional goals to assure that the school appropriately meets the educational, social and developmental needs of students.
2. Participates in and contributes to curriculum research planning and development in terms of learning and child development theory.

3. Plans and develops articulation programs and procedures to help students with transition to new grade levels.

III. With Parents and Community

1. Plans, interprets, and communicates the school guidance program.
2. Reviews and reports individual student progress and performance.
3. Selects and provides parents with appropriate information for their use in personnel, educational, and vocational planning and decision making for and with their children.
4. Selects and applies appropriate procedures for counseling with parents about their child's individual growth and development.
5. Assists in identifying, planning, and implementing non-school referrals to outside educational, medical, social service, recreational agencies, and resources for individual students.

IV. Within Profession

1. Plans and develops appropriate and responsible programs for individual and departmental professional growth.
2. Is informed of, contributes to, and participates in the aims and activities of relevant professional organizations.
3. Observes and adheres to professional code of ethics.
4. Organizes and manages personal conduct and vocational performance ethically and professionally.

WESTPORT, CONNECTICUT Evaluation Criteria

BASIC EVALUATION CRITERIA FOR WESTPORT ADMINISTRATORS

The five major categories listed here are general descriptions of the primary areas of concern regarding effective administration. The basic evaluation criteria within each category are to be used by the administrator and supervisor as a guide in developing a common understanding of effective role performance. It must be recognized that any personnel evaluation, even though it stems from factual data, must, in the final analysis, be subjective. The nub of the matter, therefore, is to focus intelligent, informed and experienced judgment on individual performances in these areas, followed by explicit goal setting that leads toward expanding strengths and eliminating weaknesses.

I. Effectiveness as an Educational Leader*

*"LEADERSHIP": Research has identified at least four major variables known to be involved in leadership: (1) the characteristics of the leader; (2) the attitudes, needs, and other personal characteristics of the leader's staff; (3) the characteristics of the organization, such as its purposes, its structures, its responsiveness to people's needs; (4) social, economic and political milieu. *"LEADERSHIP" therefore is not exclusively a property of the individual, but a complex relationship among these variables.* In light of these facts, an effective, educational leader:

1. Establishes, implements and attains appropriate educational goals for his unit that are consistent with the needs and characteristics of the pupils and community to be served.
2. Continually catalyzes staff innovation and creativity in evaluating and improving instruction.
3. Works with staff and other administrators toward improving the organizational characteristics, i.e., structures, policies and practices of his unit and of the school system as a whole.

II. Effectiveness as a Staff Supervisor

1. Establishes sufficient openness and trust with his staff members so that ideas and feelings are discussed freely and candidly.
2. Selects, evaluates and retains staff who demonstrate a high degree of competence in their roles.
3. Develops personal and/or professional goals for himself and his building unit, division, or department and provides opportunity for staff members to influence the determination of these goals. He facilitates mutual understanding as to what these goals are, how they relate to staff effectiveness, and the means to which they are attained.
4. Links the individual and collective efforts of his staff explicitly into the attainment of system goals and goals for his unit.

III. Effectiveness as an Administrator

1. Organizes and manages his unit or program (i.e., schedules, budget, maintenance, reports) efficiently and effectively to support instruction.
2. Establishes and meets deadlines.
3. Complies with Board policies and contractual agreements with teachers.

IV. Effectiveness with Parents and Community

1. Communicates the intent of programs, school and Board philosophy.
2. Involves parents in the development of goals for the unit.
3. Takes appropriate action regarding parents' requests, comments and criticisms.

V. Effectiveness within the Profession

1. Takes personal responsibility for individual professional growth.
2. Is informed regarding the aims and activities of professional organizations.

WAYLAND PUBLIC SCHOOLS
Wayland, Massachusetts

PROFESSIONAL EVALUATION

<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/> <i>Name of Staff Member</i>	Academic Year 19____/____ Total Year(s) in Wayland _____ (Including this year)
<i>School</i>	<i>Subject or Grade Level</i>

INTRODUCTION

In all forms of work, performance evaluation is commonplace. In Wayland, we wish to encourage a variety of evaluation processes. Perhaps the most effective of these is self-evaluation on the part of each staff member. To this end, we suggest that staff members call on their colleagues to review instructional plans, observe actual teaching (or other professional activities), and critique their effectiveness. We also would encourage staff members to solicit feedback from pupils and parents and to take advantage of technological devices such as video-tape, tape recorders, and the like. In terms of the formal professional evaluation involving the supervisory and administrative staff, we feel that the two major objectives are paramount in importance: (1) Assistance to the teacher in improvement of instruction and professional performance; (2) A determination as to whether or not one's total performance is compatible with the standards and expectations of the Wayland Schools with a view toward continued employment.

This form includes a brief statement of several criteria (I) normally expected to be met satisfactorily by staff members. Some may not be applicable in certain situations; others may be added, at the beginning of the year, by the supervisor.

During the year, non-tenure staff members will have two or more reports (II) and discussions relative to overall performance and tenure teachers will have one more such sessions with their supervisor or principal.

The final section is a statement (III) of evaluation of total performance.

I. CRITERIA.—Early in the academic year, meetings will be held between principals (or other evaluators) and staff for the purpose of discussing and clarifying criteria which are to form the bases for subsequent staff evaluations. Below is a list of general criteria of which some or all could become the bases for the evaluation. The evaluator may wish to include additional criteria. A staff member, likewise, may opt to state additional criteria of his own choice.

General Criteria

- A. **Organizing and Planning for Instruction.**—Evidence of learning objectives for the lessons, units, or programs; e.g., clearly-defined objectives for the school year or more specific objectives for units of work or blocks of time.
- B. **Pedagogy.**—Demonstrable expertise in the art of teaching; e.g., the use of methods or techniques appropriate to the learning tasks.

- C. **Attention to Individual Pupil Needs.**—Evidence of specific provisions for individual pupil differences; e.g., sub-grouping within the class; proper pacing; appropriate pitch or level of learning tasks; specific programs designed for independent work, remedial work, enrichment work, and the like.
- D. **Extent of Student Involvement in Learning.**—Evidence that the student is an active rather than a passive participant in the learning process; e.g., the students appear to be highly motivated and interested in the learning tasks and manifest initiative; students raise questions and enter into discussions with one another.
- E. **Evaluation of Student Progress.**—Evidence of clear assessment of student progress toward learning objectives; e.g., teacher-constructed test related to the initial learning objectives; thorough evaluation of student projects, reports, and the like.
- F. **Contributions to the General Life of the School.**—Actively participates in activities which contribute to the well-being of the school; e.g., develops unique and innovative teaching-learning strategies or materials and shares them with other staff; serves on curriculum development or other school program committees; makes constructive proposals for improvements of the school's operations, and the like.
- G. **Interpersonal Relationships.**—Evidence of positive relationships with other staff members, pupils, and parents; e.g., establishes pleasant and constructive working relationships with others; exemplifies high personal standards of professional ethics and behavior; is available to provide extra help for pupils and to discuss matters of concern with parents, and the like.
- H. **Professional Development.**—Evidence of professional improvement and growth; e.g., engages in personal reading and study to stay abreast of current developments in his/her field; academic course work; attendance or participation at conferences; use of action research in his/her own area, and the like.
- I.
- J.

Additional Criteria Desired by Staff Member:

None desired _____
Initial and Date

The following desired _____:
Initial and Date

K.

L.

M.

(Attach additional sheet if necessary)

Data Gathering

- * Evaluation evidence must be either observed or otherwise documented.
- * Data for evaluation should be collected over a sufficient period of time and should be maintained in the official personnel file.
- * The evaluation process must be flexible enough to provide for differences in the context of staff member's assignment (characteristics of students, class size, characteristics of environment).
- * The evaluation process should allow the evaluatee to gather data in support of goal attainment and to provide individual self appraisal data on an optional basis.

CHECK LIST FOR SELF APPRAISAL

CURRICULUM AND INSTRUCTION

1. Is receptive to planned change and innovation in the curriculum. Provides for input from teachers, students, supervisors and community.
 2. Assists staff in understanding their professional roles and responsibilities.
 3. Demonstrates pertinent knowledge of subject matter. Provides means and materials for staff to engage in curriculum instruction.
 4. Insures that teachers establish minimal performance criteria and demonstrates an awareness of student growth and development problems.
 5. Considers the impact of curriculum change on the students and the community.
-

ADMINISTRATION AND SUPERVISION

1. Conveys a sense of enthusiasm to staff which results in staff commitment and team work.
 2. Establishes mutually set goals with staff and allows staff freedom in terms of choosing means to reach these goals.
 3. Provides supportive supervision as an aid to staff development.
 4. Encourages the formal and informal evaluation of instructional programs.
 5. Effectively deals with students' needs and problems, such as, learning difficulties, social interaction, discipline, etc.
 6. Provides materials and resources to assist staff in meeting their needs in achieving their goals within budgetary limits.
-

PERSONNEL MANAGEMENT

1. Establishes and meets reasonable deadlines.
2. Complies with School Committee rules and regulations.

CHECK LIST FOR SELF APPRAISAL

COMMUNITY PUBLIC RELATIONS

- 1. Maintains a continuous, planned program of public relations with the community through bulletins, group meetings, open house visitation.
- 2. Recognizes that a good community image of the school gains community support.
- 3. Encourages and assists teachers to actively promote good public relations through their classroom activities.

PROFESSIONAL GROWTH AND DEVELOPMENT

- 1. Maintains contact with current research and practice in education.
- 2. Engages in professional growth activities, professional reading, university courses, educational forums, conventions, and in-service seminars.
- 3. Contributes active educational leadership within his/her sphere of influence.
- 4. Encourages staff to engage in professional growth activities.

WATERTOWN PUBLIC SCHOOLS

SELF-ASSESSMENT PART I

The Watertown Public Schools are committed to allowing the staff to participate in their evaluation by submitting a self-assessment to the appropriate supervisor. This self-evaluation will be a statement of each staff member's positive contributions throughout the year. This form should be submitted before the final evaluation conference. This self-assessment may become part of the permanent record if the teacher so chooses.

NAME _____ DATE _____

I do/do not want this self-assessment to become a part of my permanent record.

SIGNATURE _____

WATERTOWN PUBLIC SCHOOLS

SELF-ASSESSMENT PART II (*Optional*)

The comments expressed on this page will not be included in the permanent personnel file, but will be shared with the persons directly involved.

The following have/would have helped me to be more productive in achieving my goals:

NAME _____ DATE _____

WEST HARTFORD, CONNECTICUT

SELF-EVALUATION (Detailed Description)

STATE GUIDELINE	State Guideline VIII on Teacher Evaluation states: "Self-evaluation is an essential aspect of the (evaluation) program. Teachers are given the opportunity to evaluate themselves in positive and constructive ways. Opportunities are provided to each professional staff member to conduct a self-evaluation. Individuals are given the opportunity to include self-evaluation reports as part of the total evaluation report."
WEST HARTFORD	<p>In compliance with this guideline, each West Hartford teacher is encouraged to engage in a continuous self-evaluation process preceding all phases of evaluation. In any event, it may precede the mutual setting of objectives in the Improvement of Instruction Phase of evaluation.</p> <p>First, each teacher looks at his performance in relation to the position guide and job descriptors. This may be accomplished formally or informally.</p>
FORMAL	<p>A formal self-evaluation implies written comments and objectives, with a written report of follow-up activities. The teacher may develop a written report or use one suggested by the Joint Task Force on Evaluation.</p> <p>In order to verify the evaluation, a teacher may involve a peer to act as a data gatherer.</p> <p>If formal data is gathered, the following process is suggested:</p>
DATA GATHERING	<ol style="list-style-type: none">1. The teacher reviews the position guide and identifies areas for self-evaluation.2. The teacher selects one to several job descriptors of the position guide or instructional components (<i>see attached</i>) for self-evaluation focus:3. The teacher sets:<ol style="list-style-type: none">a. Focus and objectives.b. Time frame for observations and feedback.c. Process and methods of securing feedback (e.g., Guided Self-Analysis, Interaction Analysis, Data Gatherer, Video Tape, Other).4. Periodically, the teacher reviews feedback, adjusts focus, time frame, process, and methods, as necessary.
REPORT	<ol style="list-style-type: none">5. The teacher makes a final analysis and prepares a self-evaluation report, including follow-up activities. <p>(Note: the self-evaluation report and feedback data may be included as part of the teacher's total evaluation report)</p>

WEST HARTFORD, CONNECTICUT
SELF-EVALUATION (*Detailed Description*) (Contd.)

INFORMAL If a teacher participates in the self-evaluation process informally, asking and answering the following questions in relation to the position guide might be helpful:

1. What am I trying to accomplish?
2. How well am I doing?
3. How can I do better?

Evaluatee _____ School Year _____

Date _____

Directions: The teacher is encouraged to complete the following self-evaluation report or ones developed individually.

1. Specific area(s) of position guide under self-evaluation:

2. Description of self-evaluation process:

3. Result(s) of self-evaluation:

4. Follow-up activity:

Signature of Evaluatee

White copy to Evaluatee
Canary copy to Evaluatee's file
(if desired)

LONGMEADOW PUBLIC SCHOOLS
Longmeadow, Massachusetts

TO:

FROM:

DATE:

RE: Evaluation Report

Attached are two copies of your formal evaluation based primarily on classroom observations. Please read the entire report. The contents of this report should be identical to the verbal feedback you received during your post observation conference. Please see me at your convenience if you have any questions regarding the report. After reading the report, please sign both copies on the space provided on the last page of the report. Your signature only indicates that you have read the report. Your signature does *not* indicate total or even partial agreement with judgments stated in the report. You have the right and are encouraged to attach any statement of agreement or disagreement. The contents of this report are confidential. Please return one signed copy of the attached report within six (6) days after receiving the report.

CONFIDENTIAL

LONGMEADOW PUBLIC SCHOOLS
Longmeadow, Massachusetts

Appraisal of Teacher Performance for the Improvement of Instruction

Evaluator: _____

Teacher: _____

School: _____

Pre Observation Conference Held On: _____

Observations:

Date	Period/Time	Grade/Subject/Course
_____	_____	_____
_____	_____	_____
_____	_____	_____

Post Observation Conference Held On: _____

Date this report was given to the teacher: _____

LONGMEADOW PUBLIC SCHOOLS
Longmeadow, Massachusetts

Professional Performance Report—NON-TENURE Teachers

Teacher _____ School _____ Dept./Grade _____
Yrs. Exp. _____ Yrs. Longmeadow _____ Yrs. Present School _____ No. of Observations _____

Fill in boxes and comment where applicable:

Key: 1-Excellent 2-Satisfactory
3-Needs Improvement

	A. Up-to-date knowledge of subject _____
	B. Preparation of lesson plan _____
	C. Use of new and varied materials and equipment _____
	D. Effectiveness of instruction _____
	E. Enthusiasm _____
	F. Control of students _____
	G. Rapport with students _____
	H. Rapport with parents _____
	I. Rapport with staff _____
	J. Rapport with administration _____
	K. Contribution to students beyond the classroom _____
	L. Contribution to the school and/or teaching profession _____
	M. Enforcement of and compliance with school regulations _____

Teacher absences from 1st. day of school to _____ (Date)

Number of days absent _____

Teacher

Dept. Chairman

Principal

Date of Report

Dates of Conferences

Recommended for employment: Yes or No

(Comment on back if you wish.)

LONGMEADOW PUBLIC SCHOOLS
Longmeadow, Massachusetts

Professional Performance Report—TENURE Teachers

Teacher _____ School _____ Dept./Grade _____
Yrs. Exp. _____ Yrs. Longmeadow _____ Yrs. Present School _____ No. of
Observations _____

Comments:

_____ Dept. Chairman

Comments:

_____ Principal

Comment if you wish:

_____ Teacher

Teacher absences from 1st. day of school to _____ (Date)
Number of days absent _____

Date of Report

Dates of Conferences

Recommended for Increment

ANDOVER PUBLIC SCHOOLS
ANDOVER, MASSACHUSETTS

EFFECTIVE TEACHING PERFORMANCE RATING SCALE

TEACHER_____ EVALUATOR(S) _____ SCHOOL_____ DATE_____

TO WHAT EXTENT DOES THE TEACHER
EXHIBIT THE FOLLOWING STANDARDS:

Seldom

Consistently

INSTRUCTIONAL IMPLEMENTATION

1. Exhibits cognitive clarity in presentations.	1	2	3	4	5
---	---	---	---	---	---

Statement:

2. Generates enthusiasm, excitement, and/or interest during presentation.	1	2	3	4	5
--	---	---	---	---	---

Statement:

EFFECTIVE TEACHING PERFORMANCE RATING SCALE *(continued)*

3. Makes use of variety in presentation.	1	2	3	4	5
--	---	---	---	---	---

Statement:

4. Is task-oriented and exhibits business-like behavior; is able to provide for smooth class-room activity transition and monitor the class doing more than one thing at a time.	1	2	3	4	5
--	---	---	---	---	---

Statement:

5. Provides for student interaction and involvement in the presentation.	1	2	3	4	5
--	---	---	---	---	---

Statement:

EFFECTIVE TEACHING PERFORMANCE RATING SCALE *(continued)*

- | | | | | | |
|--|---|---|---|---|---|
| 6. Creates positive student-teacher rapport. | 1 | 2 | 3 | 4 | 5 |
|--|---|---|---|---|---|

Statement:

INSTRUCTIONAL PLANNING

- | | | | | | |
|--|---|---|---|---|---|
| 7. Selects and generates definable instructional objectives and plans. | 1 | 2 | 3 | 4 | 5 |
|--|---|---|---|---|---|

Statement:

- | | | | | | |
|--|---|---|---|---|---|
| 8. Achieves instructional objectives with diverse kinds of learners. | 1 | 2 | 3 | 4 | 5 |
|--|---|---|---|---|---|

Statement:

EFFECTIVE TEACHING PERFORMANCE RATING SCALE (*continued*)

9. Displays professional attitude.	1	2	3	4	5
------------------------------------	---	---	---	---	---

Statement:

10. Shows evidence of professional growth.	1	2	3	4	5
--	---	---	---	---	---

Evaluator's recommendation:

Evaluator(s) Signature(s): _____

I have read this report.

Teacher's Signature: _____ Date _____

Teacher's Comments:

ANDOVER PUBLIC SCHOOLS
ANDOVER, MASSACHUSETTS

INSTRUCTIONAL IMPROVEMENT PLAN
1979-1980

TEACHER _____	SCHOOL _____			
Standard/Area for Growth	Key Targets	Plan for Professional Growth	Expected Date of Completion	Evaluation

	Teacher		Date
	Evaluator(s)		Date
			Date

Approval of
Instructional
Improvement
Plan

Appendix D

ANDOVER PUBLIC SCHOOLS
ANDOVER, MASSACHUSETTS

Review of Instructional Improvement Plan

TEACHER _____ SCHOOL _____

Evaluator(s) Signature: _____ Date _____

_____ Date _____

I have read this review.

Teacher's Signature: _____ Date _____

Teacher's Comments:

CAMBRIDGE SCHOOL DEPARTMENT

PROGRESS REVIEW FORM

EVALUATEE _____ EVALUATOR _____

POSITION _____ POSITION _____

DATE OF FINAL CONFERENCE _____ DATE OF FINAL REPORT _____

ASSESSMENT OF GOALS ESTABLISHED IN ADEV 300:

RECOGNITION OF ACHIEVEMENT AND PERSONAL GROWTH:

Evaluatee Signature

Date

Evaluator Signature

The evaluatee's signature indicates that the evaluatee and evaluator have discussed this evaluation. The signature does not necessarily indicate agreement with the evaluator.

CAMBRIDGE SCHOOL DEPARTMENT

**GOAL SETTING AGREEMENT
ADMINISTRATIVE EVALUATION PROCESS**

EVALUATEE _____ DATE _____ EVALUATOR _____
(Signature) (Signature)

EVALUATEE POSITION

EVALUATOR POSITION

I. AREA OF CONCENTRATION AND REASON FOR SAME:

Consider organization goals, job description, personal goals, and past observations. Do not list more than five (5).

II. KEY JOB OBJECTIVES:

List the major task(s) to be addressed in relation to each area recorded in #I.

III. SPECIFIC PERFORMANCE INDICATORS:

Describe desired results in terms of observable quality standards and dates related to each major objective recorded in #II. Both objectives and results may be changed in future review sessions.

_____Special
_____Weekly
_____Monthly
_____Quarterly

CAMBRIDGE SCHOOL DEPARTMENT

STATUS REPORT

TO: _____ FROM: _____ DATE _____

CONCERNS WITH WHICH ASSISTANCE IS NEEDED TO PURSUE ESTABLISHED OBJECTIVES:

EVENTS AND CONDITIONS ABOUT WHICH YOU SHOULD BE AWARE:

**MATRIX
SCHOOL—ADMINISTRATOR
EVALUATION**

School _____

Administrator _____

of Staff _____

of Respondents _____

	Level of Response			
	1	2	3	4
1. Does your supervisor serve as a resource of current practices and trends in his/her area of expertise?				
2. Does your supervisor provide materials and equipment that has been agreed upon by both of you?				
3. Does your supervisor encourage your initiative in innovation?				
4. Does your supervisor see that curriculum is reasonably adhered to without stifling innovation?				
5. When innovation is attempted, does your supervisor help you to assess the project?				
6. Does the staff have input into staff meeting agendas?				
7. Does your supervisor encourage a full range of opinions at staff meetings?				
8. Are your supervisor's meetings pertinent and informative?				
9. Does your supervisor assist you in effecting a solution in dealing with discipline problems?				
10. Can you depend on your supervisor to keep his/her commitments?				
11. Is your supervisor decisive?				
12. Does your supervisor generally inform you in advance of impending changes that affect you?				
13. Does your supervisor admit it when he/she is wrong?				
14. When you want to see your supervisor, is he/she available?				
15. Do you find talking with your supervisor a positive experience?				
16. When you talk with your supervisor do you feel that an honest exchange of ideas is possible?				

CAMBRIDGE SCHOOL DEPARTMENT
9/79 ADEV 600-1

**MATRIX
SCHOOL—ADMINISTRATOR
EVALUATION**

School _____
Administrator _____
of Staff _____
of Respondents _____

Level of Response	1	2	3	4
17. Does your supervisor welcome your suggestions?				
18. Is your supervisor as willing to compliment you for good work as he/she is to find fault with your mistakes?				
19. When you make a mistake, does your supervisor—in a constructive way—discuss it with you?				
20. Does your supervisor realize the problems and difficulties that confront you in carrying out your responsibilities?				
21. When your supervisor gives you instructions, are they sound and clearly stated?				
22. When you complain about something to your supervisor, does he/she listen and discuss the matter in a fair, logical way?				
23. Does your supervisor encourage you to assist in the evaluation of on-going projects?				
24. Does your supervisor assist you in solving difficulties with inter-personal relationships?				

CAMBRIDGE SCHOOL DEPARTMENT STAFF EVALUATION FORM—ADMINISTRATORS

Date of Evaluation _____

Evaluate _____ Administrative Title _____ Years Teaching _____

Evaluator _____ Administrative Title _____ Experience in Cambridge _____ Cambridge _____

Rating:	5 Highly Competent 4 Commendable	3 Satisfactory 2 Needs Improvement	1 Unsatisfactory NA Not applicable (for this application)
1. How well do you know the applicant?			
2. How well do you know the applicant's work?			
3. How well do you know the applicant's character?			
4. How well do you know the applicant's ability to do the job?			
5. How well do you know the applicant's ability to work with others?			
6. How well do you know the applicant's ability to work under pressure?			
7. How well do you know the applicant's ability to work in a team?			
8. How well do you know the applicant's ability to work independently?			
9. How well do you know the applicant's ability to work in a fast-paced environment?			
10. How well do you know the applicant's ability to work in a customer service role?			
11. How well do you know the applicant's ability to work in a sales role?			
12. How well do you know the applicant's ability to work in a management role?			
13. How well do you know the applicant's ability to work in a technical role?			
14. How well do you know the applicant's ability to work in a creative role?			
15. How well do you know the applicant's ability to work in a research role?			
16. How well do you know the applicant's ability to work in a writing role?			
17. How well do you know the applicant's ability to work in a design role?			
18. How well do you know the applicant's ability to work in a marketing role?			
19. How well do you know the applicant's ability to work in a public relations role?			
20. How well do you know the applicant's ability to work in a human resources role?			
21. How well do you know the applicant's ability to work in a legal role?			
22. How well do you know the applicant's ability to work in a medical role?			
23. How well do you know the applicant's ability to work in a nursing role?			
24. How well do you know the applicant's ability to work in a teaching role?			
25. How well do you know the applicant's ability to work in a counseling role?			
26. How well do you know the applicant's ability to work in a social work role?			
27. How well do you know the applicant's ability to work in a community development role?			
28. How well do you know the applicant's ability to work in a non-profit role?			
29. How well do you know the applicant's ability to work in a government role?			
30. How well do you know the applicant's ability to work in a military role?			
31. How well do you know the applicant's ability to work in a law enforcement role?			
32. How well do you know the applicant's ability to work in a fire service role?			
33. How well do you know the applicant's ability to work in a police role?			
34. How well do you know the applicant's ability to work in a corrections role?			
35. How well do you know the applicant's ability to work in a judicial role?			
36. How well do you know the applicant's ability to work in a legislative role?			
37. How well do you know the applicant's ability to work in an executive role?			
38. How well do you know the applicant's ability to work in a senior management role?			
39. How well do you know the applicant's ability to work in a board of directors role?			
40. How well do you know the applicant's ability to work in a CEO role?			
41. How well do you know the applicant's ability to work in a CFO role?			
42. How well do you know the applicant's ability to work in a COO role?			
43. How well do you know the applicant's ability to work in a CTO role?			
44. How well do you know the applicant's ability to work in a CMO role?			
45. How well do you know the applicant's ability to work in a CDO role?			
46. How well do you know the applicant's ability to work in a CIO role?			
47. How well do you know the applicant's ability to work in a CRO role?			
48. How well do you know the applicant's ability to work in a CSO role?			
49. How well do you know the applicant's ability to work in a CLO role?			
50. How well do you know the applicant's ability to work in a CAO role?			
51. How well do you know the applicant's ability to work in a CMO role?			
52. How well do you know the applicant's ability to work in a CDO role?			
53. How well do you know the applicant's ability to work in a CIO role?			
54. How well do you know the applicant's ability to work in a CRO role?			
55. How well do you know the applicant's ability to work in a CSO role?			
56. How well do you know the applicant's ability to work in a CLO role?			
57. How well do you know the applicant's ability to work in a CAO role?			
58. How well do you know the applicant's ability to work in a CMO role?			
59. How well do you know the applicant's ability to work in a CDO role?			
60. How well do you know the applicant's ability to work in a CIO role?			
61. How well do you know the applicant's ability to work in a CRO role?			
62. How well do you know the applicant's ability to work in a CSO role?			
63. How well do you know the applicant's ability to work in a CLO role?			
64. How well do you know the applicant's ability to work in a CAO role?			
65. How well do you know the applicant's ability to work in a CMO role?			
66. How well do you know the applicant's ability to work in a CDO role?			
67. How well do you know the applicant's ability to work in a CIO role?			
68. How well do you know the applicant's ability to work in a CRO role?			
69. How well do you know the applicant's ability to work in a CSO role?			
70. How well do you know the applicant's ability to work in a CLO role?			
71. How well do you know the applicant's ability to work in a CAO role?			
72. How well do you know the applicant's ability to work in a CMO role?			
73. How well do you know the applicant's ability to work in a CDO role?			
74. How well do you know the applicant's ability to work in a CIO role?			
75. How well do you know the applicant's ability to work in a CRO role?			
76. How well do you know the applicant's ability to work in a CSO role?			
77. How well do you know the applicant's ability to work in a CLO role?			
78. How well do you know the applicant's ability to work in a CAO role?			
79. How well do you know the applicant's ability to work in a CMO role?			
80. How well do you know the applicant's ability to work in a CDO role?			
81. How well do you know the applicant's ability to work in a CIO role?			
82. How well do you know the applicant's ability to work in a CRO role?			
83. How well do you know the applicant's ability to work in a CSO role?			
84. How well do you know the applicant's ability to work in a CLO role?			
85. How well do you know the applicant's ability to work in a CAO role?			
86. How well do you know the applicant's ability to work in a CMO role?			
87. How well do you know the applicant's ability to work in a CDO role?			

I. Work Attitudes:

1. Demonstrates professional-task oriented behavior
 2. Adheres to Cambridge School Department policies and curriculum
 3. Contributes to the harmonious operation of the School Department
 4. Demonstrates punctuality
 5. Demonstrates promptness and accuracy with records and reports
 6. Adheres to contractual agreements with staff
- 65

Comments:

II. Effective Administrative Techniques:

1. Demonstrates knowledge and understanding of subject matter
2. Demonstrates knowledge of various materials/activities to support effective teaching
3. Demonstrates creativity in staff development
4. Demonstrates creativity in curriculum development
5. Uses motivational techniques
6. Provides for staff interaction
7. Encourages staff self-evaluation
8. Utilizes community resources
9. Seeks and utilizes advice and assistance of system's resource persons

	5	4	3	2	1	NA
10. Is receptive to change and innovation in the curriculum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Assists staff in understanding their professional roles and responsibilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Effectively resolves students discipline problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Effectively evaluates programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Maintains effective record-keeping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: _____

	5	4	3	2	1	NA
III. Management Techniques:						
1. Demonstrates organizational skills.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Demonstrates budgetary skills.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: _____

	5	4	3	2	1	NA
IV. Interpersonal Relationships:						
1. Relates effectively with students, professional staff and other administrators.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Relates effectively with other school personnel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Cooperates with community agencies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Promotes direct communication between school and parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments: _____

V. Personal Qualities: *(Please include some of the following attributes in your comments: sensitivity, enthusiasm, sense of humor, perceptiveness, communication ability, fairness, and consistency.)*

Comments: _____

VI. Professional Growth Activities *(Optional)*

Potential for Excellence *(Optional)*

The evaluatee's signature indicates that the evaluatee and the evaluator have discussed this evaluation. It does not necessarily indicate agreement with the evaluator.

Evaluatee's Signature

Date

Evaluator's Signature

Date

EVALUATION OF SUPERVISOR

Name of Supervisor _____ School _____

Directions: Please read each question carefully. Circle the number that most nearly reflects your opinion using one (1) as the most positive opinion and four (4) as the most negative opinion.

If you desire, provide additional comment on line below the question.

1 2 3 4 (1) Do you find talking with your supervisor a positive experience? _____

1 2 3 4 (2) Is your supervisor easy to get along with? _____

1 2 3 4 (3) Does your supervisor welcome your suggestions? _____

1 2 3 4 (4) Is your supervisor as willing to compliment you for good work as he is to find fault with your mistakes? _____

1 2 3 4 (5) When you make a mistake, does your supervisor—in a constructive way—discuss it with you? _____

1 2 3 4 (6) Does your supervisor realize the problems and difficulties that confront you in carrying out your responsibilities? _____

1 2 3 4 (7) When you talk with your supervisor do you feel that an honest exchange of ideas is possible? _____

1 2 3 4 (8) When your supervisor gives instructions to you do they seem sound? _____

1 2 3 4 (9) When your supervisor gives you instructions, are they clearly stated? _____

1 2 3 4 (10) When you are dealing with your supervisor on a problem, does he have the ability to ask questions which get at the heart of the matter? _____

1 2 3 4 (11) Does your supervisor usually let you know how you are doing? _____

- 1 2 3 4 (12) When you complain about something to your supervisor, does he listen and discuss the matter in a fair, logical way? _____
- 1 2 3 4 (13) When you want to see your supervisor, is he available? _____
- 1 2 3 4 (14) Can you depend on your supervisor to keep his commitments? _____
- 1 2 3 4 (15) Is your supervisor decisive? _____
- 1 2 3 4 (16) Does your supervisor generally inform you in advance of impending changes that affect you? _____
- 1 2 3 4 (17) Does your supervisor admit it when he is wrong? _____
- 1 2 3 4 (18) Does your supervisor serve as a resource of current practices and trends in his area of expertise? _____
- 1 2 3 4 (19) Does your supervisor allow you an opportunity to participate in staff meetings? _____
- 1 2 3 4 (20) Does your supervisor encourage a full range of opinions at staff meetings? _____
- 1 2 3 4 (21) Are your supervisor's meetings informative? _____
- 1 2 3 4 (22) Is the agenda for staff meetings wisely selected? _____
- 1 2 3 4 (23) Does your supervisor assist you in effecting a solution in dealing with disciplinary problems? _____
- 1 2 3 4 (24) Does your supervisor provide materials and equipment that has been agreed upon by both of you? _____
- 1 2 3 4 (25) Does your supervisor encourage your initiative in innovation? _____

- 1 2 3 4 (26) Does your supervisor see that curriculum is reasonably adhered to without stifling innovation? _____

- 1 2 3 4 (27) When innovation is attempted, does your supervisor help you to assess the project? _____

- 1 2 3 4 (28) Does your supervisor encourage you to assist in the evaluation of on-going projects? _____

- 1 2 3 4 (29) Does your supervisor assist you in solving difficulties with inter-personal relationships? _____

GENERAL COMMENTS:

Teacher's Signature

If there are questions which you feel should have been asked but were not, please write them below and supply your answer.

WAKE COUNTY (NORTH CAROLINA)

SUGGESTED STUDENT/TEACHER EVALUATION OF PRINCIPAL

	YES	NO
1. The principal is usually available and easy to talk with.		
2. The principal has clear ideas of what good education is and strives to communicate those ideas to others.		
3. The principal is a good resources person and problem solver.		
4. The principal listens to and involves students, parents, and teachers in major school-wide decisions.		
5. The principal allows other people to make decisions and gives them the authority to implement those decisions.		
6. The principal tries to solve issues fairly and mostly avoids being partial or biased.		
7. The principal is usually pleasant to be around and shows his sense of humor.		
8. The principal exerts leadership in encouraging and generating ideas for improving the instructional program.		
9. The principal is genuinely concerned about the welfare of the students, faculty, staff, and community.		
10. The principal is willing to make hard decisions and explain why.		
11. The principal tries to make the school clean, attractive, and safe.		
12. The thing I like best about the principal is _____		
13. The principal would be more effective if _____		

GENERAL COMMENTS:

(Optional)
WAKE COUNTY
SUGGESTED STUDENT EVALUATION OF TEACHERS
(Early Grades)
TO BE ADMINISTERED ORALLY

Form A
(K-1)

Form B
(2-3)

My teacher plans things that are fun to do in school.

☐YES ☐NO ☐SOMETIMES

My teacher lets me make up my own mind about some things I do in school.

☐YES ☐NO ☐SOMETIMES

My teacher seems to like all the children in the class.

☐YES ☐NO ☐SOMETIMES

My teacher is always willing to help me when I need it.

☐YES ☐NO ☐SOMETIMES

I would rather be at school than stay at home.

☐YES ☐NO ☐SOMETIMES

My teacher is nice to children.

☐YES ☐NO ☐SOMETIMES

My teacher talks so loudly that it hurts my ears.

☐YES ☐NO ☐SOMETIMES

My classroom is a pretty place.

☐YES ☐NO ☐SOMETIMES

I like how I do in school.

☐YES ☐NO ☐SOMETIMES

My teacher plans interesting and exciting things to do in school.

☐YES ☐NO ☐SOMETIMES

My teacher lets me choose things to do in school.

☐YES ☐NO ☐SOMETIMES

My teacher seems to like all the children in the class.

☐YES ☐NO ☐SOMETIMES

My teacher is always willing to help me when I need it.

☐YES ☐NO ☐SOMETIMES

I would rather be at school than stay at home.

☐YES ☐NO ☐SOMETIMES

My teacher is nice to children.

☐YES ☐NO ☐SOMETIMES

My teacher talks so loudly that it hurts my ears.

☐YES ☐NO ☐SOMETIMES

My classroom is a pretty place.

☐YES ☐NO ☐SOMETIMES

I like how I do in school.

☐YES ☐NO ☐SOMETIMES

(Optional)
WAKE COUNTY
SUGGESTED STUDENT EVALUATION OF TEACHERS
(Middle Grades)

	YES	NO
1. The teacher really understands and knows the subject he/she teaches.		
2. The teacher makes the subject interesting by using different techniques.		
3. The teacher makes me feel that learning is really important.		
4. The teacher gets students to find answers to questions.		
5. The teacher finds ways to help students who need special help.		
6. The teacher is fair with students and doesn't show favoritism.		
7. The teacher listens to students who come to him/her with problems.		
8. The teacher is a fair grader and is willing to listen when students disagree.		
9. The teacher keeps the class well organized without threatening him.		
10. The teacher is a pleasant person to be around.		
11. The teacher is best when he/she _____		
12. The teacher would be better if he/she _____		

GENERAL COMMENTS:

(Optional)
WAKE COUNTY
SUGGESTED STUDENT EVALUATION OF TEACHERS
 (Upper Grades)

	YES	NO
1. The teacher shows a clear understanding of the subject he/she teaches.		
2. The teacher does a good job of presenting the subject in an interesting and varied way.		
3. The teacher works to find ways to motivate students to learn.		
4. The teacher encourages creative responses to the subject by asking penetrating questions.		
5. The teacher gives special help to students with special needs.		
6. The teacher is fair in dealing with students and avoids showing favoritism.		
7. The teacher is a good listener and tries to counsel students who come to him/her with problems.		
8. The evaluation techniques the teacher uses are fair and open to negotiation.		
9. The classroom environment is well organized and productive without being threatening.		
10. The teacher is a pleasant person to be around.		
11. The teacher's strongest assest is _____		
12. The teacher would probably be a better teacher if _____		

GENERAL COMMENTS:

THE PUBLIC SCHOOLS OF BROOKLINE, MASSACHUSETTS

PARENT COMMENT SHEET

Directions for Use: Parents wishing to comment on their child's school experience are invited to fill out the following comment sheet. Additional paper may be used. Although signatures are optional, parents are encouraged to sign the comment sheet in order to allow communication between the parent and supervisor (or teacher) which is often constructive. After completing the comment sheet, parents may forward the sheet directly to the teacher or to the appropriate supervisor (principal, chairperson, or director). It should be remembered that both positive and negative comments about your child's school experience can be beneficial.

Date _____

Teacher's Name _____

Questions:

1. Do you have any general comments about your child's school experience?
2. Have you shared these comments with your child's teacher? How did the teacher respond?
3. Do you find it easy to communicate with your child's teacher? Explain.
4. If your child has had problems, how have they been handled?
5. Please use the space below for further comments you may have.

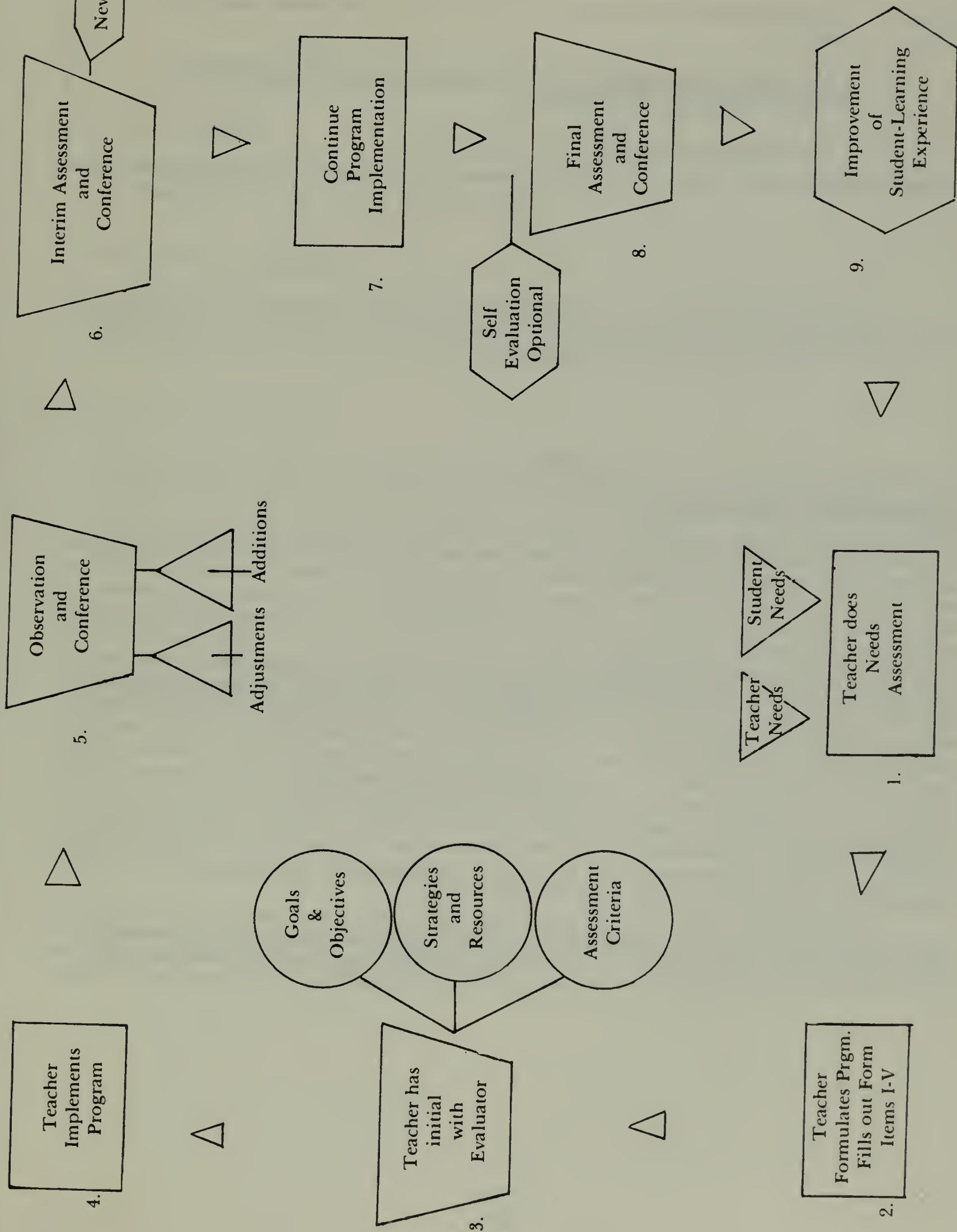
Signature _____
(optional)

Approved 6/5/78
Brookline School Committee

Personnel Files:

1. There shall be only one (1) file for each teacher maintained by the superintendent which shall contain all data relevant to the work performance of the teacher except as provided below:
 - a. Principal/Supervisor will maintain originals of observation reports written by them and signed by the teacher observed together with any written responses submitted by the teacher.
 - b. Duplicate copies of written summary evaluations may be retained in the principal/supervisor's file until a teacher attains tenure at which time the principal/supervisor's copies shall be destroyed. No other file of a tenured teacher's written evaluations shall be maintained other than the file maintained in the Superintendent's Office.
 - c. Only the following information should be maintained in the personnel file:
 - 1) Educational background materials and vitae.
 - 2) Annual summary evaluation reports with backup materials when appropriate to substantiate the report.
 - 3) Materials, such as letters of commendation, or newspaper articles, which the teacher requests.
 - 4) Complimentary materials, which the supervisor submits with the consent of the teacher.
 - 5) Payroll and attendance information.
 - 6) Derogatory material inserted pursuant to subsection 4 below, provided that materials dealing with the processing of a grievance will be separately filed as required in Article IV, E, 3.
2. Upon written request, the Superintendent will make available to a teacher his/her personnel file and he/she will be permitted to make copies of any materials therein.
3. A teacher will be entitled to have an appropriate representative of the Association accompany him/her during any review of his/her personnel file.
4. No material derogatory to a teacher's conduct, service, character, or personality will be placed in any file unless the teacher has had the opportunity to review such material and affix his/her signature to the copy to be filed with the express understanding that such signature in no way indicated agreement with the contents thereof. The teacher will also have the right to submit a written answer to such material within five days, and his/her answer shall be reviewed and signed by the Superintendent and attached to the file copy.
5. Materials in any teacher's file shall be available only to the teacher or his designated representative and the Superintendent or Assistant to the Superintendent.
6. The Superintendent shall insure that materials placed in a teacher's file shall be accurate beyond a reasonable doubt.

NORWALK, CONNECTICUT
NORWALK BOARD OF EDUCATION



Feedback Process

- All evaluations should be communicated in writing to the persons being evaluated.
- The evaluation process should provide recognition for positive performance as well as inadequacies in performance.
- The evaluation process should encourage creativity.

WELLESLEY

TECHNIQUES OF EVALUATION

There will be two techniques of evaluation. The first technique requires the Evaluator to describe and assess in narrative form the Evaluatee's performance relative to the professional responsibilities outlined in the first seven criteria in the section entitled "Criteria for Evaluation." The first seven criteria represents a comprehensive description of areas of responsibility, identifying for both the Evaluatee and Evaluator what is expected from staff members. The eighth criterion, "Performance Objectives," is an integral part of the evaluation process for every Unit A staff member but involves a technique somewhat different from the other criteria used in the assessment of the Evaluatee's performance. The technique requires the Evaluatee and Evaluator to formulate and agree upon specific objectives at the beginning of each school year, objectives which make explicit the several priorities which the Evaluator and Evaluatee agree will receive particular attention during the year. For the 1979-80 school year all Unit A staff members and their evaluators will agree upon two (2) performance objectives. Thereafter, they will agree upon at least two but no more than five objectives. It is emphasized here that the eighth criterion is one of eight criteria and will be given no disproportionate, preconceived weighting relative to the other seven. All criteria must be considered in evaluating the teacher's performance, and since the evaluation procedure requires specificity and candor in evaluating all aspects of performance, any of the eight criteria may be highlighted as areas in which performance is commended or improvements are recommended.

Except in situations involving non-tenured staff reappointments, an Evaluator should not characterize the overall performance of a teacher. Rather, characterization of performance should be limited to each of the criteria headings with clear reference to such objective information as specific incidents, situations, or events.

SUGGESTIONS FOR THE SUPERVISOR WHEN RECORDING DATA**1. Focus on strengths**

Are most of the statements positive and specific? The key to motivation is success. Will the supervisee feel “motivated” after having read this evaluation?

2. Focus on behaviors (specifics)

Are there several examples of direct behavior statements in the evaluation? The key to good reinforcement is to recognize specific behaviors—will the supervisee know specifically what it is that has been done well? Will the supervisee know specifically what needs to be altered?

3. Focus on areas of consensus

Will the supervisee believe the statements you made? Remember you are writing the evaluation to and for the supervisee. Will the supervisee be able to accept the judgments you made as being true? Will the supervisee say after reading this evaluation: “Yes, this describes me. It’s a fair evaluation,” or will he/she say: “Wow! He/She said all this stuff, but you can sure tell he/she doesn’t know what I do in the classroom!”

4. Focus on the “truth”

Will you be able to document (informally for the most part) the statements you make? After we write each statement, we should ask ourselves—is that really true? Can I defend that statement? Often times the following lead statements and phrases may be helpful:

4.1 “...from my observation I saw...”

4.2 “...several students have said that...”

4.3 “...this supervisee has indicated that...”

5. Focus on “Growing Edges” not weaknesses

Will the supervisee see areas in which you suggest improvement as areas in which he/she can improve? Are your comments about ways to do better achievable and specific? Most of us want to get better. Do your statements help more or hurt more?

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
PRE-OBSERVATION AGREEMENT

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that is maximally effective for all.

Supervisee _____ Position _____

Supervisor _____ Position _____

School/Department _____

Tenured _____ Non-Tenured: 1st. _____ 2nd. _____ 3rd. _____

Date of Pre Observation Agreement _____

Identify the domain and those competencies that relate to the objectives mutually agreed upon as areas of growth. The criteria contained in each objective will be used as benchmarks in the evaluation conference.

Select the domain and competencies from the competency indicator document that directly refers to the supervisee's role.

Document	No./Domain	Competency
----------	------------	------------

Mutually Agreed Upon Objectives:

A. Specific Objective

Plan of Action

Method of Assessment

B. Specific Objective

Plan of Action

Method of Assessment

C. Specific Objective

Plan of Action

Method of Assessment

Others:

Supervisee's Comments:

Supervisor's Comments:

***Note:** The signature of the supervisee indicates that he or she has read this report and has knowledge of its content.

Supervisee's Signature

Date

Supervisor's Signature

Date

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
DATA COLLECTION FORM

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that maximally effective for all.

Supervisor _____ Position _____

Supervisor _____ Position _____

School/Department _____

Date of Observation _____

Professional Domain—The professional staff of the Quincy Public Schools recognizes that standards of performance and professional responsibilities exist which, though not directly related to the specific instructional tasks, are reflective of the professional educator. The following represent this area:

Competencies (Reference competencies appropriate to the objectives stated in the Pre-Observation Agreement)	Meeting Role Expectancy	Need For Improvement	Indicators
---	-------------------------	----------------------	------------

Comments:

PHASE II
Form B-1

Instructional Domain—The goals of the Quincy Public Schools are to assist all learners to become competent as self-fulfilling individuals, citizens, and workers in a world that is maximally effective for all. It is for this reason that competency indicators in the instructional domain are identified for all professional staff. They serve to delineate the instructional performance and thereby, assist in the supervision of the instructional program.

Competencies (Reference competencies appropriate to the objectives stated in the Pre-Observation Agreement).	Meeting Role Expectancy	Need For Improvement	Indicators
--	-------------------------	----------------------	------------

Comments:

Non-Instructional Domain—The professional staff as part of its role within the Quincy Public School System is required to fulfill daily maintenance tasks. These tasks are those duties and responsibilities expected of it in order that the mission of the school system may be maintained.

The competency indicators in this domain, as those in the professional domain, relate directly to total professional performance.

Competencies (Reference Competencies appropriate to the objectives stated in the Pre-Observation Agreement).	Meeting Role Expectancy	Need For Improvement	Indicators
--	-------------------------	----------------------	------------

Comments:

Copy to given to supervisee by supervisor.

**To be used solely for collection of data. Information gathered on this instrument is to be shared by supervisor and supervisee as a preliminary to the Observation Report/Form B-2.*

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
OBSERVATION REPORT

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that maximally effective for all.

Supervisee _____ Position_____

Supervisor _____ Position_____

School/Department _____

Activity Observed _____

Dates Of Observation _____

This report will contain an up-date on those objectives indentified by the team. (Refer to Form A). It is based on a review of all data gathered during the observations. (Refers to Form B-1).

Data recorded by supervisor must reflect the objectives mutually agreed upon in the pre-observation conference.

Special Strengths:

Phase II
Form B-2

Identify Areas For Growth:

Ways In Which The Supervisor Has Helped Or Plans To Help The Supervisee In The Achievement Of The Mutually Agreed Upon Objectives.

Supervisee Comments: (Optional)

*Note: The signature of the supervisee indicates that he or she has read this report and has knowledge of its content.

Signature of Supervisee

Date

Signature of Supervisor

Date

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
CONFERENCE FORM

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that maximally effective for all.

Supervisee _____ Position _____

Supervisor _____ Position _____

School/Department _____

Date of Conference _____

Supervisor's Comments:

Supervisee's Comments:

*Note: The signature of the supervisee indicates that he or she has read this report and has knowledge of its content.

Signature of Supervisee *Date*

Signature of Supervisor *Date*

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION FOR EVALUATION PROGRAM
SUMMATIVE EVALUATION REPORT

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that maximally effective for all.

Evaluatee _____ Position _____

Evaluator _____ Position _____

School/Department _____

The evaluator is to evaluate the evaluatee's performance with reference to the achievement of the mutually agreed upon objectives. Use a separate form for each objective.

Date of Observations/contacts:

PHASE V

Form D

1. General statement of problem area (s): (including strengths and weaknesses)

2. Objective:

3. Summary of help given:

4. Comprehensiveness of observations:

5. Evaluation of objective:

PHASE V
Form D

6. Recommendations and/or comments:

7. Evaluatee's comment: (optional)

*Note: The signature of the evaluatee indicates that he or she has read this report and has knowledge of its content.

Signature of Evaluatee *Date*

Signature of Evaluator *Date*

Date Submitted to Main Office

One copy to the Evaluatee
One copy to the Evaluator
One Copy to the Assistant Superintendent for Plant, Business and Personnel

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
TEACHER'S PROFESSIONAL GROWTH PLAN
OPTIONAL

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that maximally effective for all.

Name of Teacher

Date Form Completed

This form is to be completed in duplicate with one copy given to your appropriate supervisor. One copy is to be retained by you. These statements should reflect your priorities for the year and be reviewed in conference as a part of the total clinical supervision process. It is expected that no more than two or three areas will be emphasized in a year. However, final evaluation will be based on total performance.

I expect to focus my teaching this year in the following areas:

1. Subject knowledge:

a. _____

b. _____

2. Instructional techniques and application:

a. _____

b. _____

FORM E

3. Individualizing instruction:

a. _____

b. _____

4. Planning and sharing instructional goals with students:

a. _____

b. _____

5. Humanizing the treatment of students:

a. _____

b. _____

6. Contribution and participation in professional responsibilities:

a. _____

b. _____

7. Curriculum development and improvement within the schools:

a. _____

b. _____

8. Personal and/or professional growth:

a. _____

b. _____

9. Other (please define):

a. _____

b. _____

10. Other (please define):

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
ADMINISTRATOR'S PROFESSIONAL GROWTH PLAN
Optional

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that is maximally effective for all.

Administrator's Name

Date Form Completed

This form is to be completed in duplicate with one copy given to your appropriate supervisor, and one copy retained by you. These statements should reflect your priorities for the year and may be reviewed in conference as a part of the total evaluation procedure. It is expected that no more than two or three areas will be emphasized in a year. However, final evaluation will be based on total performance.

I expect to focus my administrative abilities in the following areas:

1. Opening lines of communication:

- a. _____
- b. _____

2. Instructional leadership and follow-through:

- a. _____
- b. _____

3. Sharing and delegating responsibility:

- a. _____
- b. _____

4. Curriculum development and review:

- a. _____
- b. _____

5. :Community involvement and information:

a. _____

b. _____

6. Streamlining administrative routine:

a. _____

b. _____

7. Faculty growth and development:

a. _____

b. _____

8. Student services and management:

a. _____

b. _____

9. Interpersonal relations with those who share the school with me:

a. _____

b. _____

10. Other (please define):

a. _____

b. _____

LONGMEADOW SUPERINTENDENT'S APPRAISAL CHECK LIST

Longmeadow, Massachusetts

Scoring Instructions: Please assess the Superintendent's performance by scoring each item. A score of (1) is the lowest possible score and connotes gross incompetence; a score of (9) indicates excellent and/or commendable performance. Your appraisal is a serious and responsible assignment. The superintendent wants to know his level of performance as perceived by the School Committee and his colleagues.

Areas of Responsibility	Unsatisfactory			Satisfactory			Commendable			Comments
	1	2	3	4	5	6	7	8	9	
A. Relationships with the School Committee										
1. Keeps the School Committee informed on issues, needs, and operation of the school system.										
2. Offers professional advice to the School Committee on items requiring Committee action, with appropriate recommendations based on thorough study and analysis.										
3. Interprets and executes the intent of School Committee policy.										
4. Seeks and accepts constructive criticism of his work.										
5. Informs and advises the School Committee about the programs, practices, and problems on the schools, and keeps the Committee informed of the activities operating under the Committee's authority.										
6. Has a harmonious working relationship with the School Committee.										
7. Understands his role in administration of School Committee policy, makes recommendations for employment or promotion of personnel in writing and with supporting data; and accepts responsibility for his recommendations. If the recommendation is not accepted by the Committee, he willingly finds another person to recommend.										
8. Accepts his responsibility for maintaining liaison between the School Committee and personnel, working toward a high degree of understanding and respect between the staff and the Committee and the Committee and the staff.										
9. Remains impartial toward the School Committee, treating all Committee members alike.										
10. Refrains from criticism of individual or group members of the School Committee.										

Areas of Responsibility	Unsatisfactory			Satisfactory			Commendable			Comments
	1	2	3	4	5	6	7	8	9	
11. Goes immediately and directly to the School Committee when he feels an honest objective difference of opinion exists between him and any or all members of the Committee, in an earnest effort to resolve such difference immediately.										
12. Bases his position with regard to matters discussed by the School Committee upon sound educational principle and is willing to maintain that position without regard for its popularity until an official position has been reached, after which time he supports the decision of the Committee, as long as he remains in its employ.										
B. Community Relationships										
13. Gains respect and support of the community on the conduct of the school operation.										
14. Respects and understands the problems and opinions of all groups and individuals in the community.										
15. Develops good relationships with news media.										
16. Participates actively in community life and affairs as a community leader in public education.										
17. Works effectively with other institutions including Town Officials, State Legislature and local welfare agencies.										
18. Keeps the public informed about modern educational practices, educational trends, and the policies, practices, and problems in the district's schools.										
C. Staff and Personnel Relationships										
19. Develops and executes sound personnel procedures and practices.										
20. Develops good staff morale and loyalty to the organization.										
21. Treats all personnel fairly, without favoritism or discrimination, while insisting on performance of duties.										
22. Delegates at own discretion to other employees of the School Committee the exercise of any powers or the discharge of any duties with the knowledge that the delegation of power or duty does not relieve the Superintendent of final responsibility for the action taken under such delegation.										

Areas of Responsibility											Comments
	Unsatisfactory			Satisfactory			Commendable				
	1	2	3	4	5	6	7	8	9		
23. Secures and nominates for employment the best qualified and most competent teachers and supervisory and administrative personnel.											
24. Assigns and transfers employees as the interest of the district may dictate, and reports such action to the board for information and record.											
25. Reports to the School Committee the case of any employee whose service is unsatisfactory, and recommends appropriate action.											
26. Encourages participation of appropriate staff members and groups in planning, procedures, and policy interpretation.											
27. Evaluates performance of staff members, giving commendation for good work as well as constructive suggestions for improvement.											
28. Takes and active role in development of salary schedules for all personnel, and recommends to the School Committee the levels which, within budgetary limitations, will best serve the interests of the district.											
29. At the direction of the School Committee, meets and confers with leaders of the teachers association representing to the best of his ability and understanding the interest and will of the Committee.											
D. Educational Leadership											
30. Understands and keeps informed regarding all aspects of the instructional program.											
31. Implements the district's philosophy of education.											
32. Participates with staff, School Committee, and community in studying and developing curriculum improvement.											
33. Supervises planned program of staff evaluation and improvement.											
34. Provides democratic procedures in curriculum work, utilizing the abilities and talents of the entire professional staff and lay people of the community.											

Areas of Responsibility	Unsatisfactory			Satisfactory			Commendable			Comments
	1	2	3	4	5	6	7	8	9	
35. Inspires others to highest professional standards.										
36. Recommends to the School Committee for its adoption all courses of study, curriculum guides and approves changes in texts and time schedules to be used in the schools.										
E. Business and Finance										
37. Keeps informed on needs of the school program - plant, facilities, equipment, and supplies.										
38. Supervises operations, insisting on competent and efficient performance.										
39. Determines that funds are spent wisely, and adequate control and accounting are maintained.										
40. Prepares the annual operating budget recommendations and implements the School Committee approved budget.										
41. Makes recommendations with reference to the location and size of new school sites and of additions to existing sites; the location and size of new buildings on school sites; the plans for new school buildings; all appropriations for sites and buildings; and improvements, alterations, and changes in the buildings and equipment of the district.										
42. Maintains adequate records for the schools, including a system of financial accounts, business and property records, and personnel, school population, and scholastic records. Acts as custodian of such records and of all contracts, securities, documents, title papers, books of records, and other papers belonging to the board.										
43. Makes recommendations to the School Committee concerning the transportation of students in accordance with the law and the requirements of safety as required.										
F. Personal Qualities										
44. Defends his principle and his conviction in the face of pressure and partisan influence.										

Areas of Responsibility	Unsatisfactory				Satisfactory				Commendable			Comments
	1	2	3	4	5	6	7	8	9			
45. Maintains high standards of ethics, honesty, and integrity in all personal and professional matters.												
46. Earns respect and standing among his professional colleagues.												
47. Devotes his time and energy effectively to his job.												
48. Demonstrates his ability to work well with individuals and groups.												
49. Exercises good judgment and democratic processes in arriving at decisions.												
50. Possesses and maintains the health and energy necessary to meet the responsibilities of his position.												
51. Maintains poise and emotional stability in the full range of his professional activities.												
52. Is suitably attired and will groomed.												
53. Uses language effectively in dealing with staff members, the School Committee, and the public.												
54. Writes clearly and concisely.												
55. Speaks well in front of large and small groups, expressing his ideas in a logical and forthright manner.												
56. Thinks well on his feet when faced with an unexpected or disturbing turn of events in a large group meeting.												
57. Maintains his professional development by reading, course work, conference attendance, work on professional committees, visiting other districts, and meeting with other superintendents.												

G. Areas of Improvement:

H. Strengths:

I. Recommendations for Improvement:

Date _____

School Committee Member

Administrative Member

COMPOSITE PROFILE OF EVALUATION OF SUPERINTENDENT

Unsatisfactory

**STOUGHTON PUBLIC SCHOOLS
STOUGHTON, MASSACHUSETTS**

**THE ROLE AND EVALUATION OF THE
ELEMENTARY SCHOOL PRINCIPAL**

The diversity and demands of an elementary school principal in today's public schools is a combination of many highly specialized skills and responsibilities. The elementary school principal is concerned with educational leadership in curriculum, instruction, administration, staff, pupil and public relations, operation of plant and other school related activities.

The appraisal of the elementary school principal takes place constantly as he/she comes in contact with his/her professional staff, service staff, pupils, parents, and anyone even remotely connected with the school. Formal appraisal should also be a part of these normal occurrences. This type of appraisal should give him/her an opportunity to communicate his/her goals and set job targets of specific expectations and fulfillments.

PHILOSOPHY

Self-appraisal in fulfilling the role should be an on-going occurrence, as should formal appraisal for individual professional growth and performance of duties. Each area of an administrator's appraisal form should have as its underlying principles the basic philosophy, goals and objectives of the school system. In its design, the individual child's growth, the professional staff, the school system, and the individual administrator should be considered.

Any structured instrument used in a formal appraisal should consider the following goals:

1. Does it assist school principals in developing sensitivity to their competencies?
2. Does it identify general areas in which improvement is needed?
3. Does it develop realistic job targets, both short and long range, to assist in the professional growth of the individual administrator?
4. Does it give guidelines for the appraisal?

The procedure should be a constructive, supportive, cooperative and personalized appraisal. It should be a comprehensive, objective instrument based on clearly defined and attainable goals.

To be effective, an appraisal system must be planned and organized so that individual as well as cooperative efforts will lead to the improvement of administrative performance.

The following guidelines should be considered for any evaluation system for the elementary school principal.

1. His/her basic goals and objectives for the individual school system.
2. His/her unique and differentiated administrative skills and abilities.
3. The evaluation should be done by those in Central Administration.
4. Evaluation in terms of cooperatively developed performance objectives should be considered.
5. The principal should not be rated without his/her knowledge by an evaluator.
6. He/she should be evaluated on his/her contribution to the system and not compared point by point with another principal.

EVALUATION FORM

I. Administrative Performance

Discussion Topics

1. Does he/she budget his time to provide a balance between administrative and supervisory duties respectfully?
2. Does he/she assign teachers in the areas or levels in which their teaching will be most effective?
3. Does he/she delegate authority but retain responsibility and accountability?
4. Does he/she plan and organize: a) staff meetings, b) extra curricular activities, c) activity schedule, d) assembly programs, e) duty rosters so that staff can plan ahead?
5. Does he/she account for supplies and equipment but have them readily accessible when needed?
6. Does he/she prepare the building budget with carefully established building priorities and within the system policies?
7. Does he/she complete records and reports accurately?
8. Does he/she complete student records correctly and fully being sure they are accounted for and maintained in accordance with system policy?
9. Does he/she make sure staff evaluations are completed?
10. Does he/she make sure clerical staff members understand their duties and responsibilities?
11. Does he/she interpret system-wide concepts and programs as well as individual school programs to the community?
12. Does he/she advise Central Office staff on pertinent school matters?

Cooperative job targets should be stated in behavioral terms.

Addendums and follow-up comments

II. Professional Growth

Discussion Topics

1. Does he/she maintain a well formulated philosophy of education:
2. Does he/she stay abreast of current educational advances?
3. Does he/she belong to and participate in professional organizations such as: a) curriculum organizations, b) administrative organizations?
4. Does he/she pilot new programs, implement changes and innovate acceptable changes in total school program?
5. Does he/she demonstrate the desire to grow professionally by attendance in: a) meetings for new programs, b) college courses, c) workshops?
6. Does he/she make faculty aware of new ideas, programs, and methods?

Cooperative job targets should be stated in behavioral terms.

III. Improvement of Instruction

Discussion Topics

1. Does he/she formulate plans in cooperation with staff members and work with teachers individually and in groups to improve instruction:
2. Does he/she provide opportunities for teachers to try new practices and techniques as perceived by staff, superintendent, and other principals?
3. Does he/she visit classes regularly?
4. Does he/she use classroom visits and interviews to help teachers to increase their effectiveness?
5. Does he/she encourage the professional growth of teachers and help them to develop themselves to their highest potential?
6. Does he/she assist teachers in the interpretation and evaluation of the instructional process?
7. Does he/she make use of faculty meetings for the improvement of instruction?
8. Does he/she provide for mental, emotional, and physical development of all students?
9. Does he/she enlist teachers in study and activity concerning the instructional program?

Cooperative job targets should be stated in behavioral terms.

IV. Relations with Building Personnel

Discussion Topics

1. Does the staff assist in making decisions about educational objectives?
2. Do new teachers receive orientation?
3. Is he/she approachable and friendly, one to whom teachers turn for advice and assistance?
4. Is there continuous flow of two-way communication with teachers as shown by bulletin boards and daily contact with each teacher?
5. Is high morale by the staff maintained?

Cooperative job targets should be stated in behavioral terms.

V. Public Relations

Discussion Topics

1. Are visitors greeted and given prompt courteous attention?
2. Are parents aided in helping their children in school?
3. Are parents encouraged to visit school to discuss educational problems?
4. Are parents well informed about the progress of their children in school?
5. Are parents made to feel welcome when offering their services to school?
6. Does he/she utilize a variety of media to insure a continuous flow of two-way communication?
7. Is the news media kept informed about happenings in the school.

Cooperative job targets should be stated in behavioral terms.

Addendums and follow-up comments

VI. Relations with Pupils

Discussion Topics

1. Does he/she attempt to know each pupil as an individual?
2. Are legal rights and responsibilities of students protected?
3. Does he/she create a nonthreatening atmosphere within the school?
4. Is he/she fair, consistent, and impartial in dealing with students?
5. When dealing with students, does he/she consider and respect their individual characteristics?
6. Does he/she try to discover the reason why a student is having disciplinary problems?
7. Does he/she familiarize himself with student cumulative records?
8. Does he/she help in planning curriculum for exceptional students under Chapter 766?

Cooperative job targets should be stated in behavioral terms.

Addendums and follow-up comments

VII. Plant Operation and Management

Discussion Topics

1. Are plant facilities inspected regularly to insure efficient operation and healthful conditions?
2. Do building and grounds appear to be clean, with safety factors considered?
3. Does he/she report and keep records of deficiencies of building and grounds?
4. Is use of buildings for community sponsored activities handled through proper channels?

Cooperative job targets should be stated in behavioral terms.

Addendums and follow-up comments

This is to certify that the above report was discussed with me.

Date

Superintendent's Signature

Principal's Signature

NORTH SHORE REGIONAL VOCATIONAL SCHOOL DISTRICT
20 Balch Street
Beverly, Massachusetts 01915

EVALUATION FOR GUIDANCE COUNSELORS

NAME _____ POSITION _____

PERIOD COVERED BY EVALUATION _____

The evaluation covers the evaluatee's general areas of responsibilities and job goals (Part A), specific areas (Part B) and the performance factors (Part C).

PART A. DUTIES

1. Provides career guidance and counseling to a designated portion of the student body in a qualitative, appropriate and effective manner which leads to appropriate educational and vocational placement.

COMMENTS:

Strong	Satisfactory	Improvement Suggested	No Basis for Judgment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Shares appropriate individual student data with the teacher (s) with due regard for confidentiality, and assists the teacher in recognizing individual differences in students, as well as their needs in the classroom/shop.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

3. Maintains an objective and impartial view in teacher-student relationships, endeavoring to understand the problems which may exist and to assist in their solution.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

4. Involves the teacher in conferences with students and parents when appropriate promoting a better understanding of the student and his development.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

- | | Strong | Satisfactory | Improvement
Suggested | No Basis for
Judgment |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| 5. Provides the parent with accurate information about school policies and procedures, course offerings, educational and career opportunities, course or program requirements and resources that will contribute to the continuing development of the counselee.
<i>COMMENTS:</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Recognizes that the school administrators are major members of the guidance team whose outlook, leadership and support create the atmosphere for success in his counselor's important school services.
<i>COMMENTS:</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Assist teachers in the planning of in-class/shop guidance activities and acts as a resource person for obtaining up-to-date information and materials.
<i>COMMENTS:</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Assists the teacher in making referrals to other appropriate school personnel, such as remedial reading, school nurse, or the school special education program.
<i>COMMENTS:</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Maintains a cooperative working relationship with community, social and other agencies.
<i>COMMENTS:</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

PART B. DUTIES: ADMISSIONS RESPONSIBILITY

1. Organizes, coordinates and conducts a vigorous and comprehensive recruiting program.

COMMENTS:

Strong	Satisfactory	Improvement Suggested	No Basis for Judgment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Maintains grade reporting system and assists in the preparation of a master schedule.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

3. Maintains a comprehensive student data system (i.e. attendance, transcripts, temporary and permanent records) and provides statistical data as required.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

4. Develops and participates in Career Education activities on a region-wide basis as well as Career Exploration Program at North Shore.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

5. Collects data to identify trends in manpower demands for use in advising School Committee on needed program changes.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

6. Carries out any other duties as assigned by Pupil Personnel Services Director/Superintendent-Director.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

PART B. DUTIES PLACEMENT RESPONSIBILITIES

1. Establishes, implements and maintains an effective job-placement program.

COMMENTS:

Strong	Satisfactory	Improvement Suggested	No Basis for Judgment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Conducts follow-up studies of placement program and provides appropriate statistical data as required.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

3. Develops, implements and maintains a cooperative work-study program.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

4. Provides for the administration of various aptitude ability tests for pupils at the Massachusetts Department of Employment (GATB), Armed Forces (AFVSB), etc.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

5. Serves as a liaison man to post-secondary study/training institutions assisting identified students wishing advanced preparation in a specific career area.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

6. Carries out any other duties as assigned by Pupil Personnel Services Director or the Superintendent-Director.

COMMENTS:

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------

PART C. PERFORMANCE FACTORS

The following areas are important factors in the performance of any Counselor.

1. **KNOWLEDGE** Possession of sound and up-to-date information and knowledge needed to function as an educational leader.

Statement:

2. **PLANNING** Careful planning is done before action is taken.

Statement:

3. **FOLLOW-THROUGH** Planning and actions are carried out to a successful conclusion.

Statement:

4. **ORGANIZATION** Own work is well organized and coordinated.

Statement:

5. **INITIATIVE** Ability of originating and developing constructive ideas and actions.

Statement:

6. **DECISION MAKING** Decisions are sound, timely and effectively carried out.

Statement:

7. **COMMUNICATION** Both supervisors, subordinates and staff are kept well informed.

Statement:

8. **TACT** Shows tact in handling complaints and grievances by keeping personnel (or students) in wholesome working atmosphere and along lines consistent with school policy.

Statement:

9. **PERCEPTION** Depth and Breadth of perception with regard to situations encountered on the job and ability to act upon those situations.

Statement:

10. **REACTION IN EMERGENCIES** Instinctive reaction to emergencies, daily crises, and unforeseen circumstances in a logical manner.

Statement:

11. ADAPTABILITY Reponds to changing demands in new situations.

Statement:

12. THOROUGHNESS Regularly attentive to thoroughness, accuracy, completeness, and comprehensiveness in work produced.

Statement:

13. RESPONSIBILITY Willingness to assume tasks as well as accountability for decisions made.

Statement:

14. RECEPTIVITY TO Willingness to solicit and utilize constructive suggestions
SUGGESTIONS from supervisors and colleagues as a means to improved performance.

Statement:

15. OFFERING OF Skill in making suggestions, recommendations and criticism in an
CRITICISM aiding, helpful manner, with discretion and at the proper time.

Statement:

16. PUNCTUALITY Regard for day-to-day deadlines and their importance in more efficient administration.

Statement:

17. AVAILABILITY Willingness to contribute to appropriate tasks beyond normal working hours when the occasion arises.

Statement:

18. STABILITY Maintain poise and balance under unusual pressure, tension or frustrating circumstances.

Statement:

19. HEALTH Physical health, personal appearance, attendance record contribute positively toward performance.

Statement.

WATERTOWN PUBLIC SCHOOLS

SPECIALIST CONFERENCE RECORD

SPECIALIST: _____ SCHOOL: _____ DATE OF CONFERENCE: _____
SUPERVISOR _____ LENGTH OF TIME
OF CONFERENCE: _____

The following areas should be included in a specialist conference:

objectives, planning and organization, techniques and management, selection and utilization of materials, commendations and recommendations.

SPECIALIST'S COMMENT:

Unsigned copy taken by _____ on _____
(initials) (date)

<i>EVALUATOR'S SIGNATURE</i>	<i>DATE</i>	<i>SPECIALIST'S SIGNATURE</i>	<i>DATE</i>
------------------------------	-------------	-------------------------------	-------------

The purpose of this conference form is to facilitate discussion. The specialist's signature implies only that the process has taken place. This form is designed to be a record for the specialist and supervisor.

WHITE — Specialist

CANARY — Supervisor

PINK — Supervisor

6 78

EVALUATION SUMMARY/PUPIL PERSONNEL SERVICES

STAFF MEMBER _____ POSITION _____ EVALUATOR _____

THE FOLLOWING OBJECTIVES SHOULD BE CAREFULLY CONSIDERED WHEN DEVELOPING THE FINAL EVALUATION SUMMARY. EACH OF THE SIX GENERAL CATEGORIES WILL RECEIVE COMMENT.

OBJECTIVES

See specific objectives on the attached sheet.

PLANNING

1. Selects the tests and materials appropriate to stated objectives.
2. Employs suitable techniques methods and materials in meeting the stated objectives.
3. Provides for differences in the needs of each student.
4. Provides students with follow-up.
5. Prepares for counseling and testing sessions and shows written evidence of a log of activities upon request of immediate supervisor.
6. Participates in the selection and purchase of materials and equipment.
7. Cooperates with staff in planning instructional goals, objectives and methods.

TECHNIQUES

1. Works to meet the needs of all students.
2. Attempts to identify potential learning, behavioral and physical disabilities in students and seeks the assistance of other system and school-specialists in this effort.
3. Assists in insuring the progress of students during periods of extended illness and/or disabling handicaps.
4. Displays sensitivity to the emotional and social needs of each individual student.
5. Employs a variety of effective instructional techniques consistent with subject matter and the needs of the student.
6. Uses instructional media appropriate to the objectives and consistent with the physical limitations of the location provided.
7. Accepts and reacts to student feedback as a means of evaluating counseling or teaching style and specific objectives.

STUDENT EVALUATION

1. Uses a variety of diagnostic procedures to identify specific strengths and weaknesses of each student.
2. Assesses the growth of students toward achieving the objectives of instruction on a regular basis and provides assistance in the production of Quarterly Reports.
3. Communicates with and responds to parent and/or student inquiries regarding student progress.

MANAGEMENT

1. Meets with individual students or small groups in the location and at the times designated.
2. Maintains reasonable standards of behavior in teaching/testing or counseling situation.
3. Creates an environment that is reasonably clean, safe, and orderly.
4. Takes all necessary precautions to protect students, equipment, materials and facilities.
5. Completes and supervises student records according to law, policy and regulations.
6. Meets deadlines in returning administrative information.
7. Assists administration in implementing all policies and/or rules governing student life and conduct.

PROFESSIONAL AND COMMUNITY

1. Relates well to students consistent with professional role.
2. Maintains lines of communication with appropriate supportive personnel concerning progress of all assigned students.
3. Attends and, where possible, contributes to the success of staff meetings.
4. Responds to information concerning students and other related school areas in a professional and confidential manner.
5. Accepts a share of responsibility for school programs.
6. Establishes and maintains cooperative relations with others.

Unsigned copy taken by _____ on _____
(initial) (date)

I do do not recommend for
reappointment.

I do do not recommend for salary
increment.

(Signature of Evaluator)

(Date)

WHITE - Teacher CANARY
Evaluator PINK - C O

I agree that this is a fair statement
of my performance.

I disagree with this evaluation and
wish a conference with the
Assistant Superintendent.

I acknowledge that I have read this
evaluation.

Specialist comment attached to
the evaluation.

(initial)

(Signature of Specialist)

(Date)

EVALUATION SUMMARY/LIBRARY-MEDIA

STAFF MEMBER _____ EVALUATOR _____

THE FOLLOWING OBJECTIVES SHOULD BE CAREFULLY CONSIDERED WHEN DEVELOPING THE FINAL EVALUATION SUMMARY. EACH OF THE SIX GENERAL CATEGORIES WILL RECEIVE COMMENT.

INSTRUCTION

1. Provides instruction to students and teachers in selecting, locating and preparing resources.
2. Provides instruction to students and teachers in the creation of film, videotape, and photography.
3. Provides instruction on mass communications.
4. Provides instruction in independent reference skills.
5. Provides instruction for students and teachers in equipment operation and simple maintenance.
6. Provides instruction in use of facility and collection to all incoming students and teachers.

PLANNING

1. Develops projects and proposals to promote innovative use of materials.
2. Designs the annual budget, taking into consideration ALA /NEA standards.
3. Plans for adequate space and facilities to accommodate the various media.
4. Participates in curriculum planning.
5. Cooperates with staff in planning school goals and objectives.
6. Provides evidence of program planning to appropriate supervisors.

SELECTION OF MATERIALS

1. Collaborates with students and faculty to choose the variety of materials and equipment best suited to the needs of the school.
2. Serves as a materials consultant to the classroom.
3. Uses current reviewing tools in selection of materials.
4. Provides previewing activities for students and faculty.
5. Provides materials to meet varied reading levels and learning styles.
6. Selects current materials appropriate to the curriculum of Watertown Public Schools.
7. Provides materials which are highly accessible, safe to use and in good condition.

UTILIZATION OF MATERIALS

1. Organizes the center to provide maximum accessibility to user.
2. Provides learning experiences to enrich the learning experiences of the school and to demonstrate the use of media.
3. Continually strives to involve all students in the library experience.
4. Encourages use of central collections - films, video.
5. Arranges for appropriate use of televised instruction. (MET)
6. Accepts and reacts to student and teacher feedback as a means of evaluating one's style and objectives.

MANAGEMENT

1. Creates an atmosphere which is reasonably clean, safe and orderly.
2. Takes all necessary steps to protect students, equipment, materials and facilities.
3. Manages the distribution of all equipment and materials in an efficient, economic manner.
4. Maintains records of materials and equipment distributed.
5. Maintains an accurate inventory of materials and equipment.
6. Acts as liaison for all central service: films, videotapes, equipment, production services.
7. Completes on time all reports and forms for supervisory personnel.

PROFESSIONAL AND COMMUNITY

1. Relates well with students consistent with the professional role of the assignment.
2. Establishes and maintains lines of communication with appropriate personnel concerning program needs.
3. Responds to requests from students and staff regarding materials, displays and activities.
4. Handles information about students in an appropriately confidential manner.
5. Serves on curriculum development committees as materials expert.
6. Attends faculty meeting, in-service workshop, participates in continuing education, and is active in professional media and educator groups.
7. Provides services to parents and community organizations and departments of the town in need of materials and equipment.

Unsigned copy taken by _____ on _____
(initial) (date)

I do not recommend for reappointment.

I do not recommend for salary increment

(Signature of Evaluator) (Date)

WHITE - Teacher CANARY -
Evaluator PINK - C/O

*I agree that this is a fair statement
of my performance.*

*I disagree with this evaluation and
wish a conference with the
Assistant Superintendent.*

*I acknowledge that I have read
this evaluation.*

*Specialist comment attached to
the evaluation.*

(initial)

(Signature of Specialist) (Date)

WALTHAM PUBLIC SCHOOLS
Waltham, Massachusetts

Form A

Evaluators' expectations of the teachers should include positive statements as well as suggestions or expectations for improvement in specific areas.

Teachers' expectations may include either (or both) of the following: their own expectations of themselves or their expectations of the evaluators which they feel will be conducive to the achievement of their own goals and those set for them by the evaluators.

* * *

Evaluator's expectations, comments, recommendations:

Teacher's expectations, comments, recommendations:

Evaluator's Signature _____

Teacher's Signature _____

Date _____

Two Copies

CAMBRIDGE SCHOOLS

STAFF FEED BACK TO SUPERVISORS

THE ATTACHED STAFF FEED BACK TO SUPERVISOR FORM IS DESIGNED TO ALLOW THOSE WHO ARE EVALUATED THE OPPORTUNITY TO "FEED BACK" CONSTRUCTIVELY THEIR PERCEPTION OF THE ADMINISTRATIVE PROCESS AS IT AFFECTS THEM.

ALL STAFF MEMBERS SHOULD RECEIVE A FEED BACK FORM FROM AN EVALUATING SUPERVISOR. EVERY STAFF MEMBER SHOULD RETURN THIS FORM TO THE EVALUATING SUPERVISOR FROM WHOM HE/SHE RECEIVED IT.

COMPLETING THE FEED BACK FORM IS OPTIONAL. SIGNING THE FORM IS ALSO OPTIONAL. HOWEVER, IT IS STRONGLY URGED THAT EACH STAFF MEMBER COMPLETE AND SIGN THE FORM IN ORDER TO CONTRIBUTE TO A POSITIVE GROWTH OF YOUR EVALUATOR. WE ARE ASKING EVALUATEES TO SIGN IT IN ORDER THAT THEIR EVALUATOR MAY ADJUST HIS/HER ADMINISTRATIVE APPROACH TO THE PARTICULAR SITUATION. A SIGNED, COMPLETED FORM MAY SERVE AS A COMMUNICATION CATALYST, OR AN INSTRUMENT FOR DISCUSSION; THEREBY FOSTERING AN ACTIVE AND COMFORTABLE COMMUNICATION SYSTEM BETWEEN EVALUATOR AND EVALUATEE.

THROUGH THE IMPLEMENTATION OF THIS FORM, IT IS HOPED THAT STAFF WILL HAVE A MECHANISM THROUGH WHICH TO CONTRIBUTE TO THE DEVELOPMENT OF AN EFFECTIVE ADMINISTRATION.

CAMBRIDGE SCHOOL DEPARTMENT

STAFF FEEDBACK TO SUPERVISORS

Name of Supervisor _____ School/Dept. _____

Directions: Please read each question carefully. Circle the number that most nearly reflects your opinion using one (1) as the most positive opinion and four (4) as the most negative opinion. If you desire, provide additional comments on line below the question.

CURRICULUM AND SUPERVISION:

- 1 2 3 4 (1) Does your supervisor serve as a resource of current practices and trends in his/her area of expertise? _____

- 1 2 3 4 (2) Does your supervisor provide material and equipment that has been agreed upon by both of you? _____

- 1 2 3 4 (3) Does your supervisor encourage your initiative in innovation? _____

- 1 2 3 4 (4) Does your supervisor see that curriculum is reasonably adhered to without stifling innovation? _____

- 1 2 3 4 (5) When innovation is attempted, does your supervisor help you to assess the project? _____

- 1 2 3 4 (6) Does the staff have input into staff meetings agendas? _____

- 1 2 3 4 (7) Does your supervisor encourage a full range of opinions at staff meetings? _____

- 1 2 3 4 (8) Are your supervisor's meetings pertinent and informative? _____

ADMINISTRATION:

- 1 2 3 4 (9) Does your supervisor assist you in effecting a solution in dealing with disciplinary problems? _____

- 1 2 3 4 (10) Can you depend on your supervisor to keep his/her commitments? _____

- 1 2 3 4 (11) Is your supervisor decisive? _____

- 1 2 3 4 (12) Does your supervisor generally inform you in advance of impending changes that affect you? _____

- 1 2 3 4 (13) Does your supervisor admit it when he/she is wrong? _____

COMMUNITY/STAFF RELATIONSHIP:

- 1 2 3 4 (14) When you want to see your supervisor, is he/she available? _____

- 1 2 3 4 (15) Do you find talking with your supervisor a positive experience? _____

ADMINISTRATIVE EVALUATEE PROCESS

- 1 2 3 4 (16) When you talk with your supervisor do you feel that an honest exchange of ideas is possible? _____

- 1 2 3 4 (17) Does your supervisor welcome your suggestions? _____

- 1 2 3 4 (18) Is your supervisor as willing to compliment you for good work as he/she is to find fault with your mistakes? _____

- 1 2 3 4 (19) When you make a mistake, does your supervisor—in a constructive way—discuss it with you? _____

SUPERVISION

- 1 2 3 4 (20) Does your supervisor realize the problems and difficulties that confront you in carrying out your responsibilities? _____

- 1 2 3 4 (21) When your supervisor gives you instructions, are they sound and clearly stated? _____

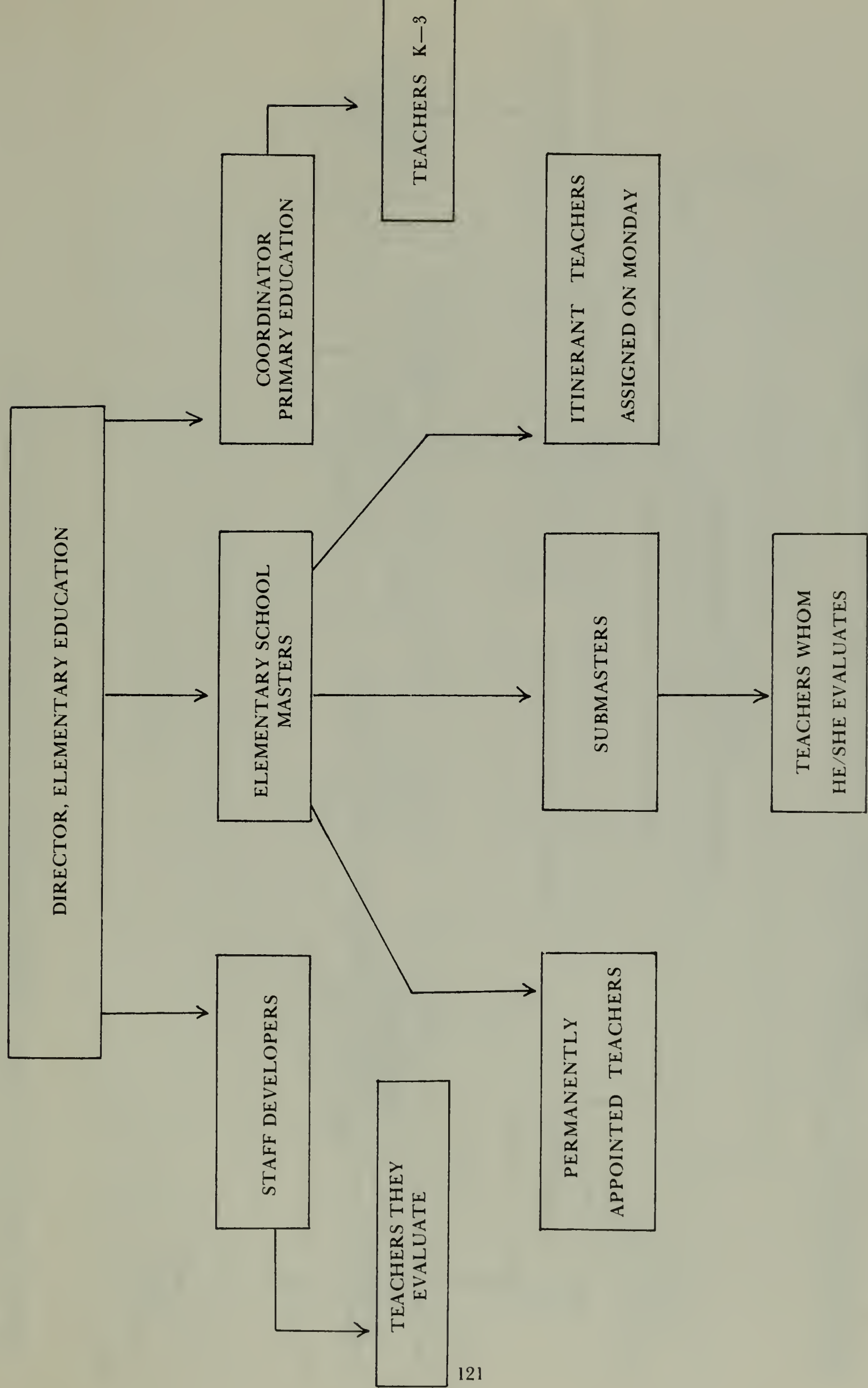
- 1 2 3 4 (22) When you complain about something to your supervisor, does he/she listen and discuss the matter in a fair, logical way? _____

- 1 2 3 4 (23) Does your supervisor encourage you to assist in the evaluation of on-going projects? _____

- 1 2 3 4 (24) Does your supervisor assist you in solving difficulties with inter-personal relationships? _____

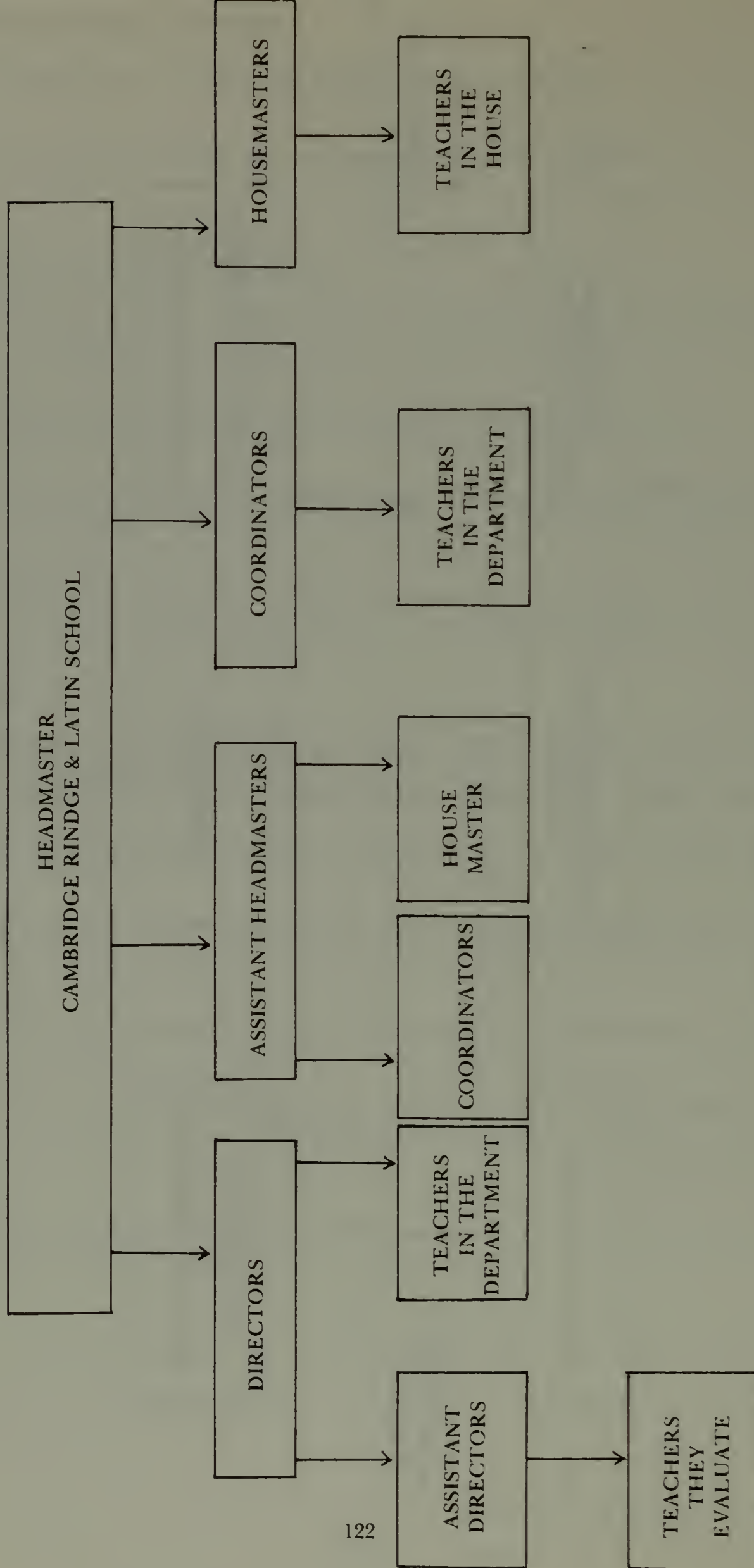
If there are questions which you feel should have been asked but were not, please write them below and supply your answer. (use reverse side if necessary)

Signature (Optional)



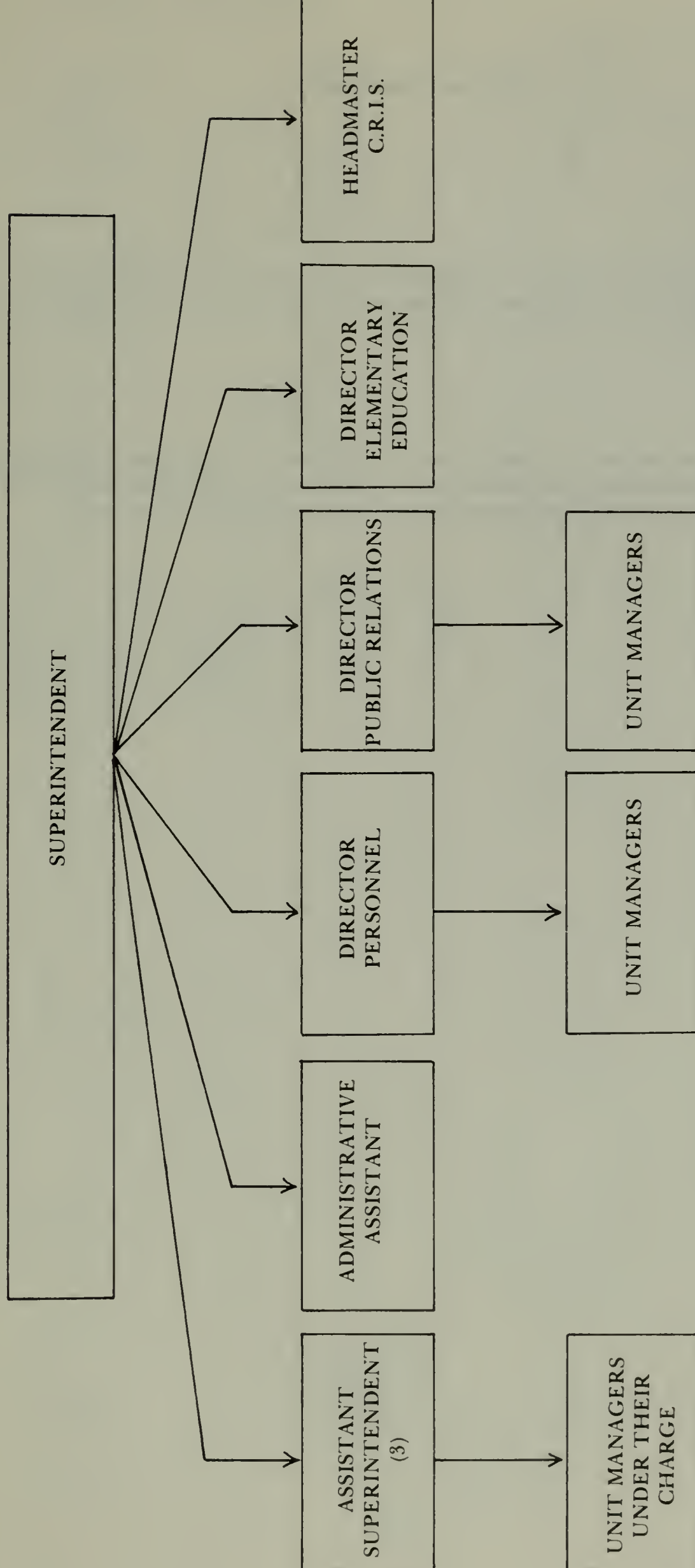
ARROWS INDICATE TO WHOM FORMS WILL BE GIVEN.
STAFF DEVELOPERS WILL GIVE THEM ONLY TO MASTERS IN THE ASSIGNED QUADRANTS.
ADMINISTRATORS MAY GIVE ADDITIONAL FORMS AS THEY FEEL THE NEED.

SECONDARY LEVEL — DISTRIBUTION OF STAFF FEED BACK FORMS



ARROWS INDICATE TO WHOM FORMS WILL BE GIVEN.
ADMINISTRATORS MAY GIVE ADDITIONAL FORMS AS THEY FEEL THE NEED.

CENTRAL OFFICE — DISTRIBUTION OF STAFF FEED BACK FORMS



ARROWS INDICATE TO WHOM FORMS WILL BE GIVEN.
ADMINISTRATORS MAY GIVE ADDITIONAL FORMS AS THEY FEEL THE NEED.

Maynard, Massachusetts

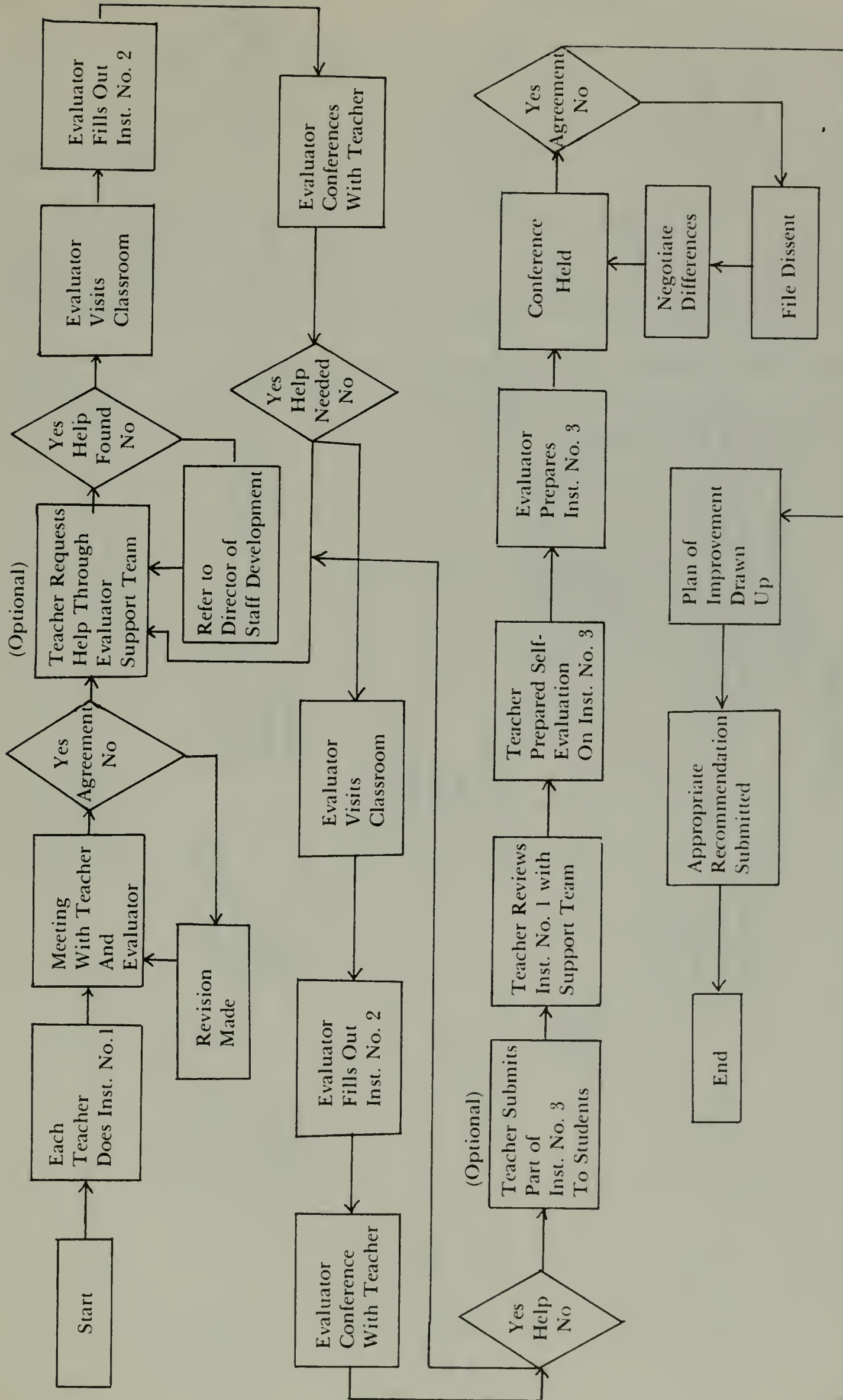
Section 3.

Administrators will be given a copy of any evaluation report prepared by the Superintendent or other designated evaluator and will have the right to discuss such report with him and to file in their personnel folders a written answer thereto.

Section 4.

Evaluation reports will be written in a positive tone. If weaknesses in an administrator's performance are observed they will be criticized in a constructive manner. The evaluator will make helpful and specific suggestions as to how the administrator might correct overall and/or specific deficiencies.

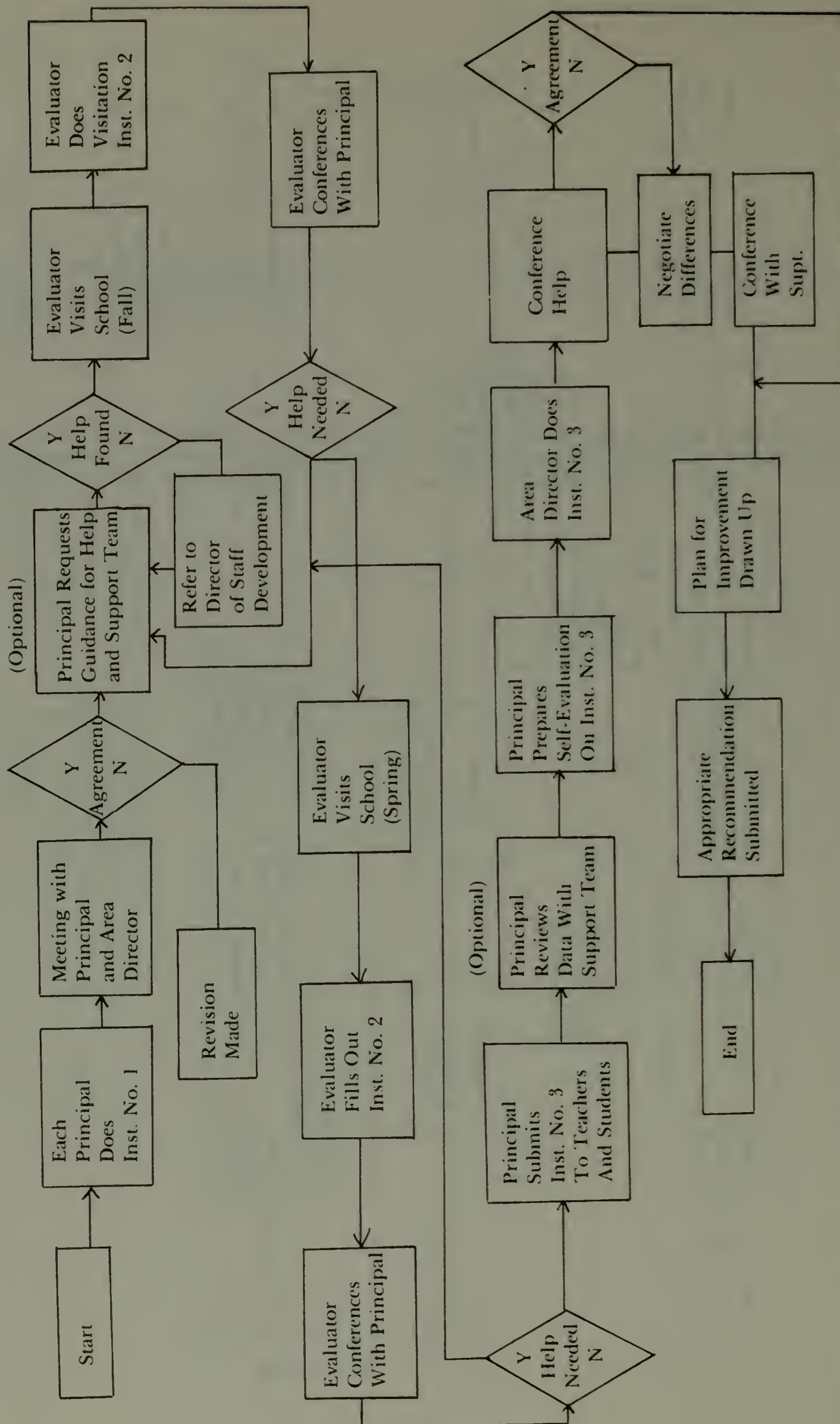
TEACHER EVALUATION SYSTEM FLOW CHART



The system flow chart calls for a minimum of two formal classroom visitations per semester. Obviously, for those situations that demand more frequent visitation, more visits and follow-up conferences will be held.

PRINCIPAL'S EVALUATION SYSTEM

FLOW CHART



The system flow chart calls for a minimum of two formal school visitations per year. Obviously, for those situations that demand more frequent visitation, more visits and follow-up conferences will be held.

Implementation

- * Adequate provision for the protection of the rights of the evaluatee and evaluator shall underlie the evaluation process.
- * Evaluative data may be aggregated and used as a basis for assessing total job effectiveness.
- * The evaluation process should provide specific recommendations and concrete resources for improving professional performance and enhancing student learning.
- * Training in evaluation skills should be provided regularly to those charged with the responsibility for evaluation.

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
ORGANIZATIONAL STRUCTURE FOR SUPERVISION

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that is maximally effective for all.

Orientation To The Program

Annually all supervisors and supervisees will be oriented to the Clinical Supervision Program For Evaluation in the Quincy Public Schools. The professional staff must be aware of the procedures of the program as well as the criteria and standards as they apply to each individual. The orientation must include a sharing of this document (No. 019) followed by an open discussion between supervisees and their immediate supervisors concerning its meaning. The Clinical Supervision Program developed by the Quincy School Committee and the Quincy Education Association Committee For Evaluation (approved by the Quincy School Committee on _____) shall be the basis for the evaluation process.

Implementation To Clinical Supervision

Evaluation in a clinical supervision program, as practiced in the Quincy Public Schools, requires that the supervisor and supervisee analyze the supervisee's performance as it relates to the school system's Design for Learning. The supervisor should take note of the supervisee's performance in all three domains, the professional, the instructional, and the non-instructional, throughout the school year. He/she should record instances wherein the supervisor will, in all likelihood, not appraise all the competencies associated with his/her supervisee during one cycle.

Following a specific phase of supervision, a supervisor shall meet with the supervisee to discuss the periods of observation and the data gathered to mutually identify strengths of performance and areas in need of improvement, if existent. Collaboratively, the team can determine if additional observations are to be limited to those areas that require assistance from the supervisor to the supervisee. Further observations may be confined to problem areas previously identified.

Designation For Supervision

The Superintendent will supervise the Assistant Superintendents. The Superintendent will engage in a Management by Objectives conference each year with all Principals and Coordinators. This conference will be one segment of the total Clinical Supervision Program in which those administrators will be involved. This conference is the evaluation section of the Clinical Supervision Program. The objectives agreed upon in these conferences will be the top priority objectives of the principals and Coordinators

The Assistant Superintendents will supervise those Directors who report directly to them.

The Directors will supervise those Coordinators who report directly to them.

The Coordinators will meet with their respective Directors in a series of conferences during a given year for the purpose of assessing the achievement of the objectives mutually agreed upon by the Superintendent and the individual coordinator in the annual Management by Objectives conference.

Each coordinator, in his/her discipline area, will collaborate with the elementary school principals in the evaluation of staff if requested by a principal or a member of the staff. Each coordinator will collaborate with the junior high school principals for the purpose of evaluating junior high school teachers in his/her discipline area. Each coordinator will collaborate with the senior high school principals and respective department heads for the purpose of evaluating senior high school teachers in his/her discipline area.

The Principals will be supervised by the appropriate main office administrator as determined at the Management by Objectives conference with the Superintendent of Schools.

The Principals will meet with these administrators in a series of conferences within a given school year. These conferences serve as an opportunity to assess those objectives mutually agreed to by the Superintendent of Schools, Coordinators, and Principals and identified as top priority objectives.

The Supervisee Shall

- for his/her personal improvement conduct a continuous self-evaluation as an integral part of the Clinical Supervision Program. This evaluation may include some of the following:
 - evaluation by students
 - observations by peers
 - micro teaching, etc.
- develop objectives for those areas identified as needing improvement.
- work to achieve objectives.
- request appropriate coordinators and/or directors to assist in the evaluation if the need arises.

The Department Head As Supervisor Shall (High School)

- discuss evaluative criteria with supervisee.
- supervise supervisee through observations and comparisons of these observations with the school system role competencies (see appropriate competency documents).
- request appropriate coordinators and/or directors to assist in the evaluation of supervisees when the need arises.
- review data gathered in the observations and conference with the supervisee and the implications of said data. The supervisor or supervisee may request the presence of another staff member.
- discuss with the supervisee the process used for self-evaluation.

- assist the supervisee in writing objectives for those areas needing improvement and continue to observe performance.
- submit the summative evaluation report to the principal (FORM D).
- discuss the results of the summative evaluation report with the principal (FORM D).

The Principal As Supervisor Shall

- discuss evaluative criteria and procedures with the classroom teachers and the support personnel (elementary and junior high school level).
- discuss evaluative criteria and procedures with department heads (senior high school).
- supervise classroom teachers and support personnel through observations and comparisons of the data gathered in these observations with the supervisee in a private conference and either party may request the presence of another staff member. (Elementary and junior high school levels and also at the senior high school if the supervisee is not satisfied with the Summative Evaluation Report as submitted by the department head to the principal).
- supervise building administrators, i.e. Assistant Principals, Deans, department heads, through observation and comparisons of the data gathered in these observations with the supervisee in a private conference and either party may request the presence of another staff member.
- request appropriate coordinator and/or director to assist in the evaluation of supervisees when the need arises.
- initiate discussion with the department head for purposes of coming to an agreement on information which will be included in the Summative Evaluation Report (FORM D) which will be submitted to the Assistant Superintendent for Business, Plant, and Personnel on each supervisee.
- submit the individual evaluation form (Summative Evaluation Report, FORM D) to the Assistant Superintendent for Business, Plant, and Personnel.

The Central Office Administrator As Supervisor Shall

- discuss evaluation criteria and procedures with the supervisee.
- review evaluations (Assistant Superintendent for Business, Plant, and Personnel).
- evaluate problem areas at the request of the principal, department head, or teacher.
- make recommendations to the Superintendent of Schools upon request.
- collaborate with the supervisees assigned to them by the Superintendent of Schools at the annual Management by Objectives conferences.

WALTHAM PUBLIC SCHOOLS
Waltham, Massachusetts

APPEAL PROCESS IN TEACHER EVALUATION

Evaluation of teacher performance will be made by 2 evaluators as follows:

- I. Secondary classroom teachers:
Building Administrator and Director
- II. Elementary Teachers:
 - a. Classroom: Assistant Principal and Principal
 - b. Support personnel: Building Administrator and Director
- III. Specialists: Building Administrator and Director

A teacher may appeal a Form B observation or evaluation by one evaluator to the other evaluator. If a difference of opinion on the teacher's performance results, or if there are two negative evaluations, the teacher may appeal to the Superintendent before January 30th, in writing, detailing the grounds of disagreement. A negative Form B evaluation after January 30th should be appealed as soon as possible.

Maynard, Massachusetts

Section 3.

Administrators will be given a copy of any evaluation report prepared by the Superintendent or other designated evaluator and will have the right to discuss such report with him and to file in their personnel folders a written answer thereto.

Section 4.

Evaluation reports will be written in a positive tone. If weaknesses in an administrator's performance are observed they will be criticized in a constructive manner. The evaluator will make helpful and specific suggestions as to how the administrator might correct overall and/or specific deficiencies.

XII ADJUSTMENT PROCESS

It is possible that disagreements may occur between the Evaluator and the Teacher at various steps in the program.

If this should occur, the following steps should be followed:

1. Every effort must be made by both Evaluator and Teacher to resolve the disagreement through at least one informal meeting.
2. If an Evaluator and a Teacher cannot come to an agreement concerning the establishment of goals or objectives, or any part of the program the two parties will seek a decision from a panel* made up of eight (8) members four (4) Teachers and four (4) Administrators) with a minimum of three (3) Teachers and three (3) Administrators being present to make the decision

The role of the panel is to:

1. Listen to both parties (separate or together)
2. Attempt to mediate the differences
3. Strive to get the parties to reach a speedy agreement.
4. Work out a reasonable compromise so that the process may proceed quickly.

*The Director of Teacher Personnel will appoint the members of the panel

QUINCY PUBLIC SCHOOLS
CLINICAL SUPERVISION PROGRAM FOR EVALUATION
RECOURSE PROCEDURES

The Quincy Public Schools is a learner responsive, performance-based school system whose primary mission is to assist all learners in becoming competent as:

- Self-fulfilling Individuals
- Citizens
- Workers

in a world that is maximally effective for all.

1. Introduction

The Clinical Supervision Program is designed to assess professional growth and efficiency. Although the clinical supervision program of professional staff evaluation in the Quincy Public Schools has as its base mutually agreed-upon-objectives against which a supervisee is evaluated, it is conceivable that a supervisor and supervisee may disagree on the data contained in the Summative Evaluation Report submitted to the Assistant Superintendent for Business, Plant and Personnel,(FORM D). In the event that such conflicts arise, procedures are available for problem resolution. The recourse procedures listed below are for those situations in need of resolution.

2. Procedures

- 2.1 The supervisee shall discuss the complaint with the supervisor in an attempt to resolve the conflict.
- 2.2 If either the supervisee or the supervisor thinks that the problem has not been resolved, he/she may request, in writing, an informal hearing with a Review Committee.
- 2.3 The members of the Review Committee that are appointed by the Superintendent and Quincy Education Association will be selected from a Standing Committee.

The Standing Committee will consist of six members - three appointed by the Superintendent and three appointed by Quincy Education Association.

The Standing Committee will be appointed annually.

A three member Review Committee shall be established for the purpose of resolving the conflict. One member shall represent the Office of the Superintendent; one member shall represent the Quincy Education Association and the third member will be selected by the individual seeking redress.

The party aggrieved may reject the first individual named to represent the Office of the Superintendent or the Quincy Education Association but must accept the second appointee from each group.

- 2.4 The Review Committee shall gather facts from both parties through interviews. It will make and submit its recommendations within twenty working days of the filing of the complaint to the supervisor and supervisee. The Superintendent of Schools shall receive a copy of the recommendation.
- 2.5 The supervisor/supervisee will react in writing to the recommendation of the Review Committee within five (5) working days.
- 2.6 If the supervisee/supervisor still believes that the decision is not appropriate, the supervisee/supervisor may appeal in writing, to the Superintendent of Schools or his/her designee. The Superintendent or his/her designee shall review the issue (s) and submit a written decision within ten (10) working days to the supervisor/supervisee.
- 2.7 If the supervisee/supervisor still believes that the decision is not appropriate, he/she may appeal to the Grievance Committee of the Quincy Education Association when applicable.
- 2.8 The recourse process may be terminated at any time by mutual agreement of the supervisor and the supervisee.

THE APPRAISAL PROCESS

I. Purpose of Appraisal

- A. To stimulate professional growth.
- B. To improve professional performance.

II. Mechanics of Appraisal

- A. The evaluatee and evaluator discuss goals and methods for best arriving at them.
 - 1. Understand exactly what will be expected
 - a. Goal
 - b. Process
 - c. Outcomes
- B. Determine precisely how the evaluatee may proceed in independent action during the year.
- C. Decide the kinds of specific help and contacts to be made with the evaluatee during the year.
 - 1. Conferences
 - a. Initiated by the evaluator
 - b. Initiated by the evaluatee
 - 2. Classroom visits
 - a. Unannounced classroom visits.
 - b. At the invitation of the evaluatee.
 - c. Well distributed throughout the year.
 - d. This does not mean that all supervisory contacts have to be entirely related to the appraisal process.
- D. Complete Appraisal of Evaluatee Performance
 - 1. Section A: Goals (October)
 - 2. Section B: Process in Reference to the Achievement of Goals (October)
 - 3. Section C: Summary Evaluation (May)
 - 4. An anecdotal Record or Contacts (October to May) should be maintained.

III. The Appraisal Conference

- A. Concern with goals, process, and outcomes.
- B. Responsibility of the evaluatee.
 - 1. Make self-appraisal a thoughtful self-inventory.
 - 2. Know what worked well; what did not and why.
 - 3. Don't be too modest to take credit for success or afraid to accept responsibility for lack of it.
 - 4. Approach appraisal conference with positive attitude.
- C. Responsibility of the evaluator
 - 1. Make sure appraisal judgements are supported by evidence.
 - 2. Be willing to admit failure to provide as much help as desired.
 - 3. Create sense of joint responsibility for successful job performance.
 - 4. Commend where possible; constructively criticize when necessary.
- D. Outcomes of the conference
 - a. What are the next steps?
 - b. How can performance be further improved?

NUMBER AND DATES OF EVALUATION

There will be three evaluations for all non-tenure teachers.

FIRST: November 15 Initial Evaluation, Analysis and Program
for Growth

SECOND: January 15 Intermediate Evaluation and Progress Report

THIRD: March 15 Final Evaluation

The intent of each evaluation should be to encourage growth and report on professional competency. Since contract notices are issued on or before April 15 of each year, all study and review is keyed toward a firm decision by March 15. The pattern of constructive in-service performance and success or failure of the teacher should be progressively evident on the evaluation reports.

1. A folder should be maintained on each teacher by the principals. The folder should contain pertinent information concerning the teacher's effectiveness, growth in elimination of weaknesses, etc.
2. An anecdotal record of observations, discussions, action taken by principal, director, department head, and action taken by teacher as a result of evaluation.
3. A contact sheet with dates should be part of the folder.
4. Teacher evaluations should be done by means of:
 - (a) written report
 - (b) check-off sheet
 - (c) dialogue between teacher and principal
5. The evaluation for April 15 contract or tenure decisions should be self-evident as a result of cumulative evidence documented from the beginning of the teacher's career in Westwood.
6. Teachers should know their strengths and weaknesses from the very first evaluation - no later than December 15th from the principal and others on how to improve. Evaluation without follow-up help is not satisfactory.

MERIDEN

YEARLY EVALUATION CYCLE TEACHER EVALUATION PROGRAM CALENDAR

DATES ACTION TO BE TAKEN

July - August In-Service Training for Administration Staff regarding various aspects of the Teacher Evaluation Program.

By the First Week in

September All teachers receive the Board of Education's goals and objectives, and the objectives of their principal and in some cases, their subject supervisor.

By Mid-September An orientation on the evaluation program is conducted for teachers.

By the End of October Supervisors conference with all teachers to discuss the suitability of proposed professional objectives. Two copies of the finalized objectives are prepared by the teacher. One copy is forwarded to the supervisor.

From the End of

October On At least one (1) progress conference is scheduled and conducted by supervisors for each teacher. Where appropriate, observations are performed. All conferences are written up by the supervisor. In any instance where teacher and supervisor disagree, the teacher may submit a separate Data Form write-up of the conference. Also, teachers are encouraged to conduct a self-evaluation for progress conferences utilizing the Self-Evaluation Forms. Self-Evaluations will be processed and filed in the same manner as Data Forms.

As Soon As Possible All marginal or unsatisfactory cases are discussed with the teacher and reported to the appropriate Central Office administrator.

By the End of January* Supervisors confer with Central Office administrators explaining and indicating the reasons for the tentative evaluations contemplated for teachers including recommendations for tenure. All evaluations are completed and forms sent to the appropriate Central Office administrator.

Before March 1* Notices of unsatisfactory performance are completed by the superintendent.

By June 1 Supervisors conduct final reviews of teachers' professional objectives.

By July 1 Supervisors forward to the appropriate Central Office administrator copies of year-end evaluations of professional objectives for review and placement in personnel folders.

*Applies only to personnel designated unsatisfactory or not on tenure.

Southern Berkshire Regional School District

PROPOSED —STAFF EVALUATION PROCESS

1. Education for Supervisor
2. Education for Teacher
3. Pre-Evaluation Conference Initiated by Supervisor
 - a. Review of Philosophy, Purpose, and Criteria (attached)
 - b. Review of Various Optional Methods Available (see attached descriptions)
 - c. Mutual Selection of Methodology To Be Used (see attached descriptions)
 - d. Familiarization of Form (s) To Be Used (copy attached)
 - e. Set Dates
4. Evaluation Will Be Carried Out In Accordance with District Philosophy and Established Criteria and Methods (see attached descriptions)
5. Post-Evaluation Summary Is Completed Annually by a Supervisor and Reviewed with Teacher. Upon completion It Is Sent To the Central Office for Reappointment and Personnel File.
 - a. Summary Is To Be Written
 - b. Teacher Has Opportunity to Comment and Sign (**Note:** Signature Does Not constitute Agreement with Content of the Report. Refer to Agreement - Article IX, Section A)

The evaluation process is intended to be a long-term process which takes into consideration the total educational environment in which each staff member performs. It is not intended that portions of the process be used as the sole basis for reprimanding, suspending, or short-term discipline; however, nothing herein limits the authority and responsibility of the principals for disciplining, reprimanding or suspending teachers as provided under Article IX, Section C, of the Teachers' Agreement and Chapter 71, Section 42, of the General Laws of the Commonwealth.

1/10/80
TAC/hk

RE: POST EVALUATION SUMMARY

The Post Evaluation Summary shall include:

- 1) Areas of commendation
- 2) Areas in need of improvement
- 3) Plans for improvement
- 4) Recommendations (for reappointment, etc.)
- 5) Number of years in the district

RE: FREQUENCY

Non-tenure teachers-annually (must include at least **three** direct observations; one within the first 30 days of teaching)

-Tenure teachers-biannually (Evaluations for tenure teachers can be conducted annually as time permits at the request of the teacher. They may also be conducted annually at the request of a supervisor when a documented problem exists.)

Note: All teachers shall be given at least 24 hours notice prior to a formal evaluation. All formal monitoring or observation will be conducted openly with full knowledge of the teacher.

RE: APPLICATION OF DEFINED CRITERIA

Non-tenure teachers- Teachers will be evaluated on all criteria each year. Method of data collection determined by supervisor.

Tenure teachers- Criteria selected jointly by the teacher and evaluator and may include any of the established criteria. However, it is expected that in a span of six years every teacher shall be evaluated on all the criteria. Also, if the teacher elects to develop other comparable criteria aside from those listed he/she may do so with approval of supervisor. Method of data collection developed jointly.

RE:METHOD * OPTION

- 1) Teacher/Supervisor (traditional model)
- 2) Teacher/Peer/Supervisor
- 3) Teacher/Supervisor (self-analysis model)
- 4) Teacher/Peer Team/Supervisor

* All methods shall include a pre-conference and an analysis of data conference. Teachers shall be given a copy of any and all reports prepared during or after the evaluation process. Method of collecting data for all options will be developed jointly by supervisor and tenure teachers.

PILOT AND IMPLEMENTATION PLAN

Suggested Dates -

January 21, 1980 - (3:00 pm, Career Education Center)
Informing Staff of Plans and Progress to Date

February 7, 1980 -
Informing School Committee of Plans and Progress to Date

February 11 to 29 - (2 days)
Training Evaluators/Teachers

March 1 thru May 1 -
Pilot Program

May 1 thru May 30 -
Analysis of Field Test Results

June/July 1980 -
Refining and Revision (1 Day Workshop)

July/August -
Follow-up Training for Evaluators

September 1980 - June 1981 -
Implementation by All Non-Tenure Staff and Half of Tenure Staff

Summer 1981 -
One Day Workshop for Committee and Administrators to Make Final Refinements

September 1981 - June 1982 -
Implementation by All Non-Tenure Staff and Other Half of Tenure Staff

ADMINISTRATIVE REGULATIONS

BARNSTABLE

The Barnstable School Committee, in its policy on Teacher Evaluation, describes evaluation as “a process which gives teachers the opportunity to do their very best. It is a cooperative understanding carried on with mutual respect. The teacher should be a partner in the process. . .”.

The Barnstable School Committee again places emphasis on trust in professional growth when it voted in the Spring of 1976 that all tenure teachers were acceptable and that the thrust of evaluation should be directed toward professional growth.

These regulations which describe the process of evaluation attempt to fulfill the intent of the Committee policy.

I. General:

The evaluation procedures of the Barnstable Public Schools will have three phases:

- A. Phase 1 - This phase of evaluation is concerned with first, second, and third year non-tenure teachers. It is primarily a rating system that should provide professional growth and information regarding further re-election to the Barnstable Public Schools.
- B. Phase 2 - This phase of evaluation is concerned with all tenure teachers and strives for improved learning and teaching that benefits the students; i.e., professional growth.
- C. Phase 3 - This phase of evaluation is concerned with all teachers and deals with unsatisfactory performance of a particular person. It is totally apart from the other evaluative procedures. This procedure is described in the booklet entitled, “Phase III - On Notice of Employment Status”.

II. Timetable:

Formal written evaluations shall be completed as follows:

- A. Phase 1-
 - 1. By end of November
 - 2. By February 15
 - 3. By May 15 - first year teachers only
- B. Phase 2 -
 - 1. Individual staff will prepare their job targets, if they choose self-evaluation, by the last school day of October
 - 2. Job target conference should take place no later than the last school day in November.
 - 3. Post-conference should take place no later than the fourth Friday in May.
 - 4. Other conferences should be scheduled as they seem necessary.
 - 5. Formal evaluations should be given to the Superintendent no later than the second Monday in June.

III. Process:

- A. Phase 1 - Non-tenure teachers are evaluated and re-elected annually. The purpose of the evaluation is to cause these staff members to improve professionally, but it is also used as an instrument to determine re-election to a position in the Barnstable Public Schools.

The form for Phase 1 evaluation is included elsewhere in this booklet.

Second and third year staff are encouraged to participate in the self-evaluation process.

- B. Phase 2 - All tenure teachers - this process presumes acceptability of the staff member and recognizes the individual differences of the staff member. Self-evaluation is encouraged, but optional. Teachers who choose not to participate in self-evaluation will be evaluated solely by the supervisor. The process is composed of the following components:

1. Self-evaluation to develop job targets for professional growth
2. Joint conference—supervisor-educator
3. Monitoring or data collection
4. Evaluation on achievement of job targets

The following addresses each component:

1. Self-evaluation

Prior to setting job targets, the individuals involved should conduct an analysis that includes such things as job descriptions, system philosophy, goals and priorities of school/department/program/team and an analysis of the teacher's past performance. After the analysis has taken place, the teacher should develop job targets which he will share at the target setting conference.

The Teacher Role: Prior to the objective setting conference, the teacher should do considerable self-evaluation. An introspective analysis of past performance, job description, district priorities, school and /or department goals, and personal goals will give the teacher some areas of possible focus for targets. The teacher should then determine specific targets and write those targets. It is important that the teacher not skip lightly over this step. This step is what will individualize the evaluation process. If the teacher goes into the job target setting conference empty handed, the supervisor is most likely to give some targets. The process is more constructive if the teacher is prepared.

The Supervisor Role: Prior to the job target setting conference, the supervisor should become familiar with the teacher's past performance. Keeping that in mind as well as school and district priorities, the supervisor may develop targets for the teacher to focus upon. In addition, the supervisor should identify the support to be given the teacher.

2. Job Target Setting Conference

This step requires the teacher and the supervisor to discuss the targets which will be focused upon during the ensuing evaluation cycle. The negotiation of the targets is where the evaluation process becomes individualized. Most targets will be quickly agreed upon. However, there may be some conflict because of initial disagreement about what targets should be addressed. It is important that any conflict surface at this point so it can be resolved rather than remain hidden and surface later. Following are some important points concerning targets:

- a. The individual's targets should be consistent with the school or school district goals.
- b. The number of targets will vary, but should not exceed six.
- c. Targets should be prioritized to enable the person to properly allot time and effort.
- d. Targets must be measurable or observable.

In addition to agreement on targets, there should be agreement on several other points:

- a. A monitoring plan
- b. Schedule for interim and final conference
- c. Agreement and understanding of what has been decided upon in the conference

Teacher Role: At the objective setting conference, the teacher presents his or her targets and should expect the supervisor to comment regarding those targets. It is also likely that the supervisor will present some targets that he or she considers important for the teacher to focus upon. The product of the conference is a plan—an agreement between the teacher and the supervisor on how the teacher will be evaluated. It is extremely important that the agreement be clearly stated.

Supervisor Role: The supervisor receives targets the teacher desires to focus upon and assists in making them clear. Targets developed by the supervisor are discussed. Targets are agreed upon. Also, the nature and extent of support and help to be provided the teacher is determined. The supervisor should develop a copy of the evaluation agreement.

GENERAL NOTES:

1. Each year the evaluation procedure will be discussed and evaluated with administrators and teachers in order to improve the process.
2. Appeals to the Superintendent may include the following:
 - a. That procedures are fair and consistently implemented.
 - b. That the process of monitoring is reasonable.
 - c. That targets are clear, reasonable, and manageable.

3. Monitoring the Data Collection

The focus of this activity is collecting data, not evaluating performance. Monitoring performance and evaluating performance are two separate functions. During the job target setting conference, agreement is reached on the monitoring procedures to be used. Data can be collected in a variety of ways depending upon objectives being pursued. Performance can also be monitored by a variety of people including the supervisor, the teacher, peers, and students. Any number of instruments and observation strategies can be employed.

Teacher Role: Between conferences it is important for the teacher to monitor his/her performance by collecting data. Good written records must be kept. Constant self-evaluation should take place.

Supervisor Role: The supervisor is responsible for monitoring as provided in the agreement. Classroom observations are made as agreed and other relevant data are collected. It is important that written records be kept.

4. Evaluation Conference

Data must be interpreted to give it meaning. That interpretation takes place at the evaluation conference. It must be remembered that the evaluation is in terms of the job targets previously agreed upon. Again, evaluation is not something done by just the supervisor. Self-evaluation is an important part of evaluation. It is essential for philosophical as well as practical reasons. Close supervision is not possible, nor is it desirable most of the time. If the process is to be developmental, it should encourage honest self-assessment. However, if the process has been followed, the supervisor is not making secretive judgements of a summative nature. Instead, the evaluations are formative and are a reflection of the available data. There may be instances when there is no agreement whether or not a job target has been met. The teacher may interpret the data one way and the supervisor may interpret it another way. In such cases, both parties should prepare a written evaluation summary for that objective to be included in the evaluation report.

Teacher Role: The teacher presents his or her evaluation of the job target, receives the supervisor's assessment, and assists in completing an evaluation report. The teacher should also assess the performance of the supervisor and the evaluation process and make suggestions for the next phase of the cycle.

Supervisor Role: The supervisor comes into the conference having already made an assessment of the data collected in the monitoring process. The teacher is encouraged to present a self-analysis. The supervisor presents his/her evaluation and both evaluations are discussed. An evaluation is made cooperatively by the participants.

Job targets in general can be defined as a highly definitive personalized written plan which:

1. Identified one or several related observable activities designed to improve the effectiveness of an individual educator's professional efforts.
2. Is cooperatively developed by the individual and his immediate supervisor.
3. Is identified with a specific area of the educator's responsibility.
4. Outlines methods and techniques for monitoring and assessing either objectively and or subjectively the degree of the educator's accomplishment of the target.

The following are offered as guidelines for drawing job targets:

1. the job target must be defined in terms of results or conditions to be achieved—not just activities to do.
2. Job targets should be written so that they can be analyzed and reviewed from time to time.
3. Written job targets should start with an action term such as achieve, completed by, replace, convince, etc.
4. Job targets newly formulated should be set in the light of past experience.
5. Job targets should be stated in positive terms such as what to do rather than negative terms such as what to avoid.
6. Job targets should be concise statements without complex and elaborate descriptions.
7. Job targets should cover a single ended result and not a number of commitments.
8. Job targets that have been changed and modified must be recommunicated with the involved administrator.
9. Job targets must be realistic as to the resources, facilities and skills that are available.

SECTION VI

TRAINING FOR EVALUATORS

I. Overview

Developing a sound approach to evaluation is difficult and time-consuming. Existing models offer some assurance that it can be done and provide general directions for districts to take. But each school district must develop its own approach based on local needs and resources, once the initial step of developing procedures and instruments is taken an even more difficult problem surfaces: how can written guidelines and procedures be converted to practice?

Installing new evaluation practices must recognize, confront, and overcome a number of barriers. In addition to technical problems and weaknesses, the list includes: fear and distrust among those who are evaluated; uncertainty, inconsistency, and stress of evaluators and concerns of parents and community residents for accountability, and weaknesses.

One strategy for dealing with problems of implementing new evaluation procedures is to provide training. However, the range of responses to training needs is unusually wide. Some districts are not aware that training is important. Others know the importance but either lack resources or do not know where to look for assistance. Still others rely too heavily on “one-shot” workshops hosted locally or at various locations outside the districts. Only a few districts devote substantial time and energy to designing vigorous, on-going training programs. The fact that so few districts provide training undoubtedly undermines efforts to improve evaluation: if teachers and administrators are to receive the support they need, training is a top priority for all school districts in the Commonwealth of Massachusetts.

The purpose of this section is to provide guidance for districts wishing to initiate or to improve training in evaluation. By training, we do not only mean workshops that focus on important skills such as observing or holding evaluation conferences. We do not ignore such activities, but rather see these as part of a broader definition of training. By training we mean any activity that is conducted for the purposes of (1) improving how well individuals know and understand evaluation guidelines or procedures, (2) improving a wide range of skills in evaluation or in areas which provide supplementary support to the process, or (3) increasing the acceptance, confidence, or legitimacy of evaluation practices among participants, clients, and residents of a local community.

Included in this definition is a wide range of activities which school districts may consider to deal with specific issues as evaluation procedures are put into action. Intensive workshops, informal discussions among evaluators, useful studies of the evaluation process, or resources which individuals ponder on their own are all forms of training. Without such training, most districts will either be disappointed by the slippage between intentions and reality or overwhelmed by the problems accompanying the efforts to improve evaluation. While training is no panacea, it can help if carefully planned and suited to a district's unique needs.

This report does not suggest all of the available training resources in evaluation. Rather, it highlights some approaches and resources that are currently used in school districts in Massachusetts or in selected locations across the country. Interviews with administrators - as well as individuals who provide training - were the main sources of information.

The report provides a primer for districts which are considering training. Its scope includes:

- General principles of training

Successful training requires certain characteristics. Our interviews in districts with advanced training programs and with individuals who provide training pinpointed several important features. These can be used as criteria for judging the potential of any specific effort. Training programs that do not observe these general principles will be less likely to produce desired results than those that do.

- Goals and Sequence of Training

Training in evaluation has a number of important goals and purposes. Training can promote understanding, acceptance, confidence, and faith in an evaluation process. Training can develop skills needed to make evaluation work effectively - whether the process is designed mainly to improve instruction, to make decisions about continued employment or both. Training can also upgrade skills needed to supplement basic aspects of the evaluation process. Communicating effectively, managing time, reducing stress in healthy ways, and managing conflicts so that it does not overshadow evaluation activities are examples of areas that are important but peripheral to the core skills of observing, conferencing, or writing evaluation reports.

Additionally, our interviews suggest a sequence in the goals of training. Skill training prior to training designed to foster understanding and acceptance will probably be ineffective. Training in supplementary areas may be needed to create a climate in which improved observation or conferencing skills can produce optimum efforts.

- Methods and Resources

Our interviews with school districts and trainers also revealed specific training programs now operating in Massachusetts and other areas. These programs are aimed at a variety of goals. A review of these programs suggests some possibilities and pinpoints specific districts and resources to consult for assistance at the local levels.

- A Training Checklist

Our interviews with districts and trainers suggested a number of questions that need to be considered before designing or revising a training program. While the answers are probably different for each school district, the questions can guide local decision-making. Considering the questions is an important activity before, during, and after training has begun. (The questions can be found in Section V - "A Checklist for Assessing and Developing Training Programs".)

II. General Principles of Training

Not all training is effective. Large scale studies of innovative programs question the value of training - particularly when it consists of one-shot workshops conducted by external consultants. Training can also backfire. Studies of some communications workshops, for example, reveal that short-term training actually can create new problems rather than improve skills. Training is sometimes an activity that school districts do mainly to show that something has been done. While training of this sort serves important symbolic needs, it usually does not accomplish other desired ends. And since evaluation is so important, training programs that work are sorely needed.

The big question is what can be done to make training effective. While answers are elusive, our interviews gave us confidence in some general principles that might guide the development of training activities. There is no guarantee that observing these principles will assure success. But, other things being equal, the following the guidelines should be a step in the right direction.

There are twelve general principles:

1. Know why you are doing the training and make the rationale widely known. Diverse goals or reasons exist for evaluation training. A district must recognize the reasons for deciding to train evaluators or others. The reasons must be based on local needs (unusual political pressures, standards of excellence, age of faculty, experience of administrators, etc.) and must be identified through careful planning. Planners must make sure that everyone knows the reasons behind the training.

2. Use what you have first. Any district will have strengths that already exist—skills and competencies, shared understandings, open, trusting relationships between people—that can provide a foundation for training. A training program will be stronger if resources already available are tapped before seeking outside help.

3. Make sure the superintendent, school committee, and critical “others” are behind the effort. To succeed, evaluation training requires support from everyone. But demonstrated support from the top is essential from the outset. Top level support is necessary for symbolic reasons—it signals that training is important. It is also necessary for practical reasons—decision-makers can assign resources.

4. Provide sufficient resources. Without adequate time, money, energy, and materials, any training programs will fail. Resources must be available as needed—without a constant struggle.

5. Charge one individual with overall responsibility for training. An individual should be responsible for initiating, assessing, monitoring, and coordinating training as well as for assuring quality control. Responsibility for various components of training may be distributed to appropriate individuals throughout a district. But one central office administrator should be widely recognized as “in charge” of the total effort.

6. Establish training as an integral part of the district’s operation. Training should be embedded in the district’s general operating goals, and treated the same—no more important, no less so—than any other essential practice or activity. The effectiveness of training should be determined by the same methods used to assess other important programs.

7. Make training attractive to those who can benefit from it. A successful training program is one which individuals choose to attend. Their reasons might include: a need *they* feel; enjoyment of training activities; opportunities to build working relationships with colleagues; ready availability of the sessions; obvious relationships between training and real-life practice; or an advance opportunity to shape the sessions. Training should never have a stigma attached—it should be a widely accepted and normal professional responsibility. An on-going cadre of individuals who receive and give training provides an important critical mass of expertise within the district.

8. Design training activities which engage participants with one another and with pertinent materials in a climate conducive to learning and growth. Training sessions must include hands-on activities, real-life cases, opportunities to practice skills, and chances to interact with other participants in a candid, non-threatening atmosphere.

9. Link training to everyday practice. To be successful, training must be continually reinforced in practice. Even the best training will be useless unless it is reflected in everyday behavior, understandings, and attitudes. Participants must feel the activities are ones they can carry back to their practice. One means of assuring the connection of training to everyday practice is to monitor use of skills learned in sessions. Another is to reward desired practices. Still another is simply to pay attention—in a variety of ways—to those practices which training is designed to improve.

10. Keep training current. Any training program will need constant reassessing and revising. If activities no longer meet needs, they should be changed. If an activity has not worked, it should be dropped. New developments or activities which may suit new or existing needs should be incorporated.

11. Rely on external consultants for specific inputs, not for ongoing training. External consultants can often bring perspectives and skills that are not available in-house, fill gaps in existing resources, or deal with a temporary need. But the key to a successful effort is a critical mass of insiders who keep training alive—not external consultants who blow in, blow off and blow out.

12. Don't be afraid to reinvent the wheel. Effective training requires, above all else, faith and confidence. Participants need to believe in training and know that it suits immediate needs. Training also needs to fit the motif of a particular district. These requirements will be met only if training opportunities are invented locally or if those borrowed from other districts are adapted to local conditions.

III. Goals and Sequence for Training

Training often emphasizes developing skills of evaluators - observing, conferencing, or writing final evaluations. These skills, of course, are vital to any evaluation process that does what it is supposed to do. But there are several important goals that training may pursue. For an evaluation system to work effectively, several needs are evident.

- The process (documents, instruments, and procedures) must be widely known and accepted, fully understood, and seen as legitimate. Additionally, an evaluation process requires a conception of good teaching shared across all groups - including students, parents, and residents of the local community.

- Evaluation skills and techniques for improving instruction need to be finely honed - observations, communication of evaluations, and working jointly with those being evaluated. But, in addition, other

skills assume great importance when evaluations are used for making decisions about personnel - adhering to time lines, consistently following procedures, documenting various steps, and writing clear and straightforward appraisals.

- Supplementary skills and understandings must be strengthened to support the evaluation process. Human relations skills, approaches to manage stress and conflict, and strategies for clarifying roles and responsibilities are often important in creating a climate of trust and openness.

Within a given district, any need may become a top priority goal for training. For some districts the most important goal may be to increase the awareness, understanding, or confidence in the evaluation process. This may include disseminating the main steps of the process, convening groups to discuss and revise the procedures of the evaluation instrument, or soliciting perceptions of the evaluation process from various groups and allowing these views to be confronted openly. In many districts, the most important goal of training may be to arrive at a shared conception of good teaching.

For other districts, the top-priority is to improve skills of evaluators. Some districts may be concerned with skills for improving instruction; others emphasize skills needed to make judgements that are accurate, consistent, and legally defensible. Concern about skills may not be limited to evaluators. Training can also focus on skills needed by those being evaluated and provide help to improve the skills and understanding of parents or students who take an active role in the evaluation of teachers or administrators.

In still other districts, the main goal of training may be to create support for the evaluation process. Training in stress management may soothe tensions and concerns which accompany evaluation. Focusing on school climate or human relations skills may help to increase mutual respect and trust. Emphasizing the administrative problems in evaluating - time management or conflict management - may help evaluators to be more efficient. Helping teachers to seek other employment possibilities may reduce some of the threat when reducing the size of the professional staff is necessary.

An important step in designing a training program is to identify pressing needs as a basis for the goals of training. Goals of training are more comprehensive than many districts now imagine. But goals are not mutually exclusive. Training which yields a shared conception of teaching may produce more skilled evaluators. Wider understanding of evaluation procedures may improve the climate of evaluation. But it is important that goals of training be developed before specific activities are selected.

For districts beginning a training program, it may be helpful to consider the goals of training as a sequence of activities. It would be unwise to begin skills training until the process is understood, accepted, and seen as legitimate - or a shared conception of teaching is hammered out. It may also be important that issues of climate, trust, or communication be dealt with before training in evaluation skills proceeds. The sequence of training is probably as important as the substance.

Within the Commonwealth of Massachusetts, and in other districts across the country, there are examples of districts that are now involved in training programs with various purposes or goals. Highlighting these approaches to illustrate the possibilities is the task of the next section. But it is crucial to remember that training serves a variety of goals. The need for training must be reviewed before activity gets underway.

IV. Methods and Resources for Training

What specific methods do school districts use to achieve training goals? The interviews identified a number of approaches. Some of these are training programs in Massachusetts. Others exist in districts outside the Commonwealth. In addition, there are resources - locally and nationwide - which could be tailored to suit a variety of training needs. Our emphasis is on resources that are actually being used, rather than the full range of those that are available.

The following examples highlight several possible approaches to training. These examples show generally how training can be done. Many districts in Massachusetts will see in the examples specific models they may wish to adapt to suit local training needs. To others, the examples will kindle imagination to create training specifically designed to remedy existing weaknesses in evaluation practices. Some districts will want to contact districts or consultants for more details or assistance. Examples are listed for each of the three main goals of training: promoting understanding, acceptance or legitimacy; improving skills; and providing supplementary support for basic evaluation activities.

Examples of training programs designed to promote understanding, acceptance, and legitimacy, or to develop shared conceptions of teaching:

- A simple method of increasing understanding of the evaluation process is to distribute evaluation handbooks. In Framingham, for example, the handbook explains the process, answers questions which typically arise about evaluation procedures, and includes copies of various forms. These handbooks can be used either by individuals or in staff workshops.

- Another method of helping people understand evaluation is to hold orientation sessions which explain the process, answer questions, and provide a vehicle for discussion and negotiation. West Hartford, Connecticut, Amherst, and Reading are examples of districts that hold such sessions.

- Acceptance of evaluation procedures can be encouraged in a number of ways. The Cambridge district produced a slide show highlighting the deliberations of the committee as it developed the evaluation procedure. The slide show is used in training sessions to demonstrate the give and take, rationale, issues, and compromises that were a part of developing the district's approach to evaluation.

- Quincy is using another method. There a committee composed of representatives from all internal groups spent a substantial amount of time developing a new approach to evaluation. Training within the committee encouraged a common language and orientation. Regular contact between representatives and their constituencies keeps everyone informed and provided continuing opportunities for input and influence. The final documents are now being submitted to all groups for feedback and approval.

- Lunenburg used experiences of other districts to stimulate internal discussion of issues and problems involved in implementing a Management-by-Objectives evaluation system. Teams of department heads, administrators, and teachers visited other districts with a Management-by-Objectives system. Upon returning to the districts, team members distilled their observations and shared their experience with others. Understanding the experience of other districts can be used to enhance understanding locally.

- Duxbury recently completed an audit of a forward-looking evaluation process developed three years ago. The audit was sponsored jointly by the school committee and the teacher association. Its purpose was to gather perceptions of the evaluation system from several viewpoints. Two external consultants (Terrence Deal and Sharon Rallis of Harvard's Graduate School of Education) spent two days

in Duxbury interviewing members of various groups. One consultant interviewed teachers - the recipients of evaluation. The other gathered the views of school committee members, administrators, department heads, students and parents. These diverse views were woven together in a report highlighting the strengths and weaknesses of the evaluation system and suggesting some issues in need of attention. Discussions of the report within each role group followed with the external consultants present. As a training activity, the audit was designed to increase knowledge and understanding of the evaluation process and, through discussions and future improvements, to foster greater trust, faith, and confidence.

- A training program in Marlboro, while focusing on supervisory skills, emphasizes the development of a consistent approach to evaluation across schools in the district. Training addresses questions such as: What do criteria mean? How do we interpret criteria? The main goal is a common understanding of the criteria for evaluation.

- Concord's approach to training emphasizes the development of a shared conception of teaching. Two external consultants (Robert Gower and Jon Saphier of Research for Better Teaching, Inc.) have been working with teachers using 15 parameters of teaching as a common framework for discussion of teaching practices. The training has recently been extended to include administrators who will ultimately use the parameters of teaching as a basis for classroom observations. a consortium of districts (Concord, Carlisle, and Lexington) with the help of the external consultants, has formed to support a project extending the training still further. A proposal outlines steps to use the parameters of teaching as a common base for teachers, supervisors, evaluators, and staff developers (a role to provide even more instructional assistance to teachers). Specific skill training in observing and other aspects of evaluation will be used to make the shared conception of teaching operational.

- Madeline Hunter, of U.C.L.A.'s Graduate School of Education, has isolated eleven components of successful teaching through extensive analysis of teaching behavior. These eleven components form a conception of teaching that can be used to guide classroom observations and conferences. Critical to this approach are five questions which evaluations must address? (1) Is there a perceivable objective? (2) Is the objective appropriate for this group of learners? (3) Was the objective achieved? (4) What did the teacher do that facilitated learning? (5) What did the teacher do that interfered with learning? Several districts in California and elsewhere have used this framework to guide evaluation and supervisory efforts.

- West Hartford, Connecticut holds regular inservice sessions dealing with topics such as : what is quality teaching? how do students learn?

To review, one critical need is to develop an evaluation approach that is fully understood, widely accepted, seen as legitimate, and guided by a shared conception of good teaching or of good management in the case of administrative evaluation. This need becomes an important goal of training - one that usually needs to be tackled before others can be addressed. Several school districts are now providing training in this area. Their efforts highlight some of the possibilities that others need to explore.

Examples of training programs designed to develop skills of evaluators.

One of the most common goals of training is to improve the skills of administrators, supervisors or others who are responsible for conducting evaluations. Training activities take two forms: those that are concerned primarily with skills related to the improvement of instruction and those that are concerned with skills that assure evaluations can be used to make personnel decisions. Although the two sometimes overlap, training for each takes a different slant.

A number of districts have training designed to improve the skills of evaluators in efforts to improve instruction.

- Framingham holds five workshops a year. These emphasize observation skills, including more systematic approaches such as Flanders Interaction Analysis, (a scheme for capturing the structure and content of communication channels) conferencing strategies, and exercises to increase inter-rater reliability among evaluators. The workshops involve both teachers and administrators, on released time, and are held at off-campus locations.

- West Hartford, Connecticut provides training for both teachers and administrators. The sessions are led by the personnel director. Hartford's summer sessions provide opportunities for evaluators to practice skills in an actual classroom setting.

- Worcester offers regular courses after school sponsored by the school system's Office of Teacher Training. The purpose of these training sessions is to explain the theory behind clinical supervision, to provide opportunities to relate theory to practice using video tapes, and to practice skills of conferencing, observing and joint development of teaching goals. Worcester's sessions are voluntary, open to anyone, and participants receive equivalent credits.

- Weston uses external consultants from the Leadership and Learning Corporation to provide training in evaluation skills which emphasize case studies, role playing, writing different outcomes to case studies, developing case studies around important problems of evaluation within the district and providing opportunities for participants to brainstorm solutions.

- The Superintendent of Minuteman Regional Vocational-Technical High School in Lexington develops and uses workshops which introduce an evaluation by objective (EBO) approach to the improvement of instruction.

- Amherst offers inservice training for knowing what to observe, how to critique teachings and how to write evaluations. Sessions are given by the district's own staff and are designed to provide ample opportunities for sharing and dialogue among participants.

- Some districts provide training for evaluators using a one-to-one format instead of group workshops. In Westport, Connecticut, the Special Assistant to the Superintendent for Personnel sits in on evaluation conferences. As he later talks with evaluators about their performance he models effective conference techniques. In Oakland, California, the personnel director counsels evaluators, and makes specific suggestions about how their activities might be improved. He spends considerable time working individually with evaluators who need help. In Stow, the superintendent works directly with principals to improve written evaluations. He reads all written evaluations, holds conferences to discuss strengths and weaknesses and rewards, through a merit system with those principals who write strong written evaluations.

- Raleigh, North Carolina, has established an Administrative Academy in which principals themselves are responsible for training in observation skills. Principals developed their own syllabus, designed a series of small group exercises, produced a video-tape, and outlined a sequence of steps in which principals write and critique observation reports. One year the superintendent required principals to spend at least two periods a day in classrooms and to write observation reports after each visit.

- The Network, Inc. of Andover, Massachusetts provides two types of training in evaluation skills. The first is an awareness workshop which outlines 25 elements of ideal staff evaluation and introduces skills in areas of self-evaluation, observation, feedback, student evaluations, and on issues which arise from the system-as-a-whole. The second training event is a follow-up workshop which focuses on one of the elements introduced in the introductory session and outline rules, practices, and issues.

- Keith Acheson, College of Education, University of Oregon, conducts two-day workshops which focus on classroom observation techniques and strategies for holding effective conferences. Acheson also conducts workshops which, in addition to observation and conferencing skills, focus on what needs to be done in evaluation to observe due process concerns and to provide resources at the district level needed to support evaluation practices in schools. These expanded sessions are team efforts in which Acheson works closely with an attorney and the superintendent of schools.

Examples of training to develop skills for conducting evaluations for use in making personnel decisions include:

- Wayland's training emphasizes procedures for writing clear, legally defensible evaluations. The Assistant Superintendent for Personnel holds sessions which teach supervisors the mechanics of evaluation procedures and provide hands-on practice in writing evaluations. He also offers support and training, and monitors the evaluation process by reading drafts of principals' evaluations, by conducting observations himself, and by sharing with supervisors events at arbitration hearing where evaluations have played a key role. Finally, Wayland uses the Network Inc. of Andover for additional skill training and sends supervisors to a variety of evaluation workshops.

- In Greenwich, Connecticut, central office personnel read all observation reports and run workshops to train supervisors to write clear and specific evaluations. These workshops use actual examples of evaluations from which names have been removed. Their language is examined to determine how the evaluation would hold up in court.

- Workshops in Reading aim to develop guiding principles for writing evaluations. Supervisors are asked to write evaluations. Copies are collected and subjected to review by the group. In addition, all day summer workshops use role plays and simulations, conducting goalsetting conferences, dealing with troubled employees, and giving feedback are topics included in these sessions. The system also produces and distributes to teachers materials on due process and supervision. These materials inform teachers of their legal rights and responsibilities.

- Weston holds mock reduction-in-force workshops where supervisors review simulated personnel folders to check for clarity, to discuss particular cases and weight the various documents in the case, and to review principles for sound decision making.

In summary, the emphasis of the training sessions designed to improve evaluation skills is twofold: focusing of observation, conferencing, and writing techniques to help teachers improve, and focusing on procedures and writing skills so that evaluations may follow due process and be used for making personnel decisions.

Examples of Training Programs Designed to Provide Supplementary Support to Basic Evaluation Training.

- Some districts provide support by holding regular meetings in which supervisors polish skills, compare work, and share experiences of evaluating.

- Weston offers leadership seminars which are ongoing inservice meetings scheduled throughout the school year for all department heads, directors, and other administrators. In these seminars, administrators learn supervisory skills as well as share and discuss difficult cases. Similarly, the Director of Personnel in Lexington holds regular "Supervisors' Cabinet Meetings" in which department heads discuss various supervisory approaches, compare written evaluations, share case studies, and examine difficult situations.

- Some systems use regularly scheduled inservice meetings to support administrators and department heads in their dealings with general leadership issues. Since evaluation is one aspect of administration, training in this area is included in some of these sessions. For example, the Oakland, California schools have two certified staff developers who hold regular meetings which address issues of curriculum and instruction, as well as evaluation. In Quincy, meetings deal with management skills such as forecasting and planning.

- Another approach designed to support supervision is inservice sessions around developing interpersonal relations skills. Westport, Connecticut holds inservice workshops emphasizing skills such as motivation, counseling, and goal setting. Quincy does training in human relations with an aim toward developing sensitivity, trust, and openness, characteristics which Quincy considers to be necessary to the success of their clinical supervision process.

- Various external consultants or organizations provide workshops dealing with supplemental services for supervisors. William C. Carey, a former school superintendent in California, has developed a self-contained manual/video tape series on the administrative problems of teacher evaluation. Topics include: skills of principals, diversity of teachers, authority and power of principals, rewards principals control, agenda for staff meetings, teacher stress, principal stress, time management, staff morale, and union issues.

- Project Leadership provides a set of self contained guides available through the Association of California School Administrators. Materials for workshops focus on "time management", "staying alive", "communication skills", "improving school climate", and "humanistic lay-off dismissal procedures."

- Weston uses an unusual approach to support teachers in a time of pressures stemming from reductions in force and evaluations. A committee provides counseling on job alternatives available to teachers. The group offered seminars with panelists of town residents presenting a look at new careers. The committee also assists teachers with resume writing, in making contacts, and in getting interviews.

Since the evaluation process is usually complex and difficult, a range of peripheral needs may surface. In order to free people to participate fully in the evaluation process, these needs should be met. School systems have used a variety of ways: inservice sessions to deal with issues such as stress or human relations; ongoing opportunities to share experiences, efforts, and problems among colleagues; committees to help teachers who are looking for alternatives to teaching; or hiring outside consultants with special skills. These training opportunities can offer a useful supplement to other basic training.

Throughout these approaches, a number of different training methods can be seen. These methods may be used individually or combined to form an approach suited to a specific training goal.

To summarize: among school districts in Massachusetts (and elsewhere) the following training methods are illustrative:

- case studies—in books or locally developed cases
- role playing—with observers
- brainstorming
- discussions of how to give negative feedback and how to conference
- samples of evaluations followed by group critique
- hypothetical or actual case studies highlighting possible outcomes
- mock RIF workshop—using personnel folders from a hypothetical department needing to eliminate one or two positions; staff members analyze folders and develop criteria for decision making
- tape-recorded conferences—followed by group critique
- video-tapes of teaching situation—followed by group critique, having each person write down observations, followed by pairs who take turns role-playing teacher or evaluator
- critiques of actual written evaluations to check for clarity and intent of language
- arenas which provide chances for staff members to express their concerns about the evaluation process
- pairing new with experienced administrators for training
- workshops in time management and other management areas
- staff members reporting back to school several days before students to provide time for both formal sessions and informal conversations about evaluation
- role modeling
- slide-tape presentations.

V. A Checklist for Assessing and Developing Training Programs

School districts throughout the Commonwealth report a wide range of training programs from sporadic one-time efforts to those that are multifaceted and on-going. Given unique conditions created by each district's level of staff development, personnel needs, local environment, etc., each district will have unique training needs. Even with an understanding of the general principles and goals of training, it may be difficult to put these ideas into action. Part of the problem each district will face is recognizing exactly where in the sequence of having it may fit, or where its strengths or gaps may lie.

A list of questions might prove useful for districts as criteria for assessing existing training or as considerations in designing new efforts. The checklist is intended to serve only as a simple guide, not as a road map, to help a district determine its own direction improving or creating a training program for evaluation. The questions reflect the substance, issues, and examples discussed throughout the report. Specific questions are listed in a logical sequence of six generic categories which need to be addressed in assessing or developing any training program.

Why Training?

Why is training for evaluation needed?

In what specific techniques or skills do participants need training?

Do all participants understand the purpose of training?

Who Is Involved?

Who has responsibility for the training process, making decisions about personnel materials, timing, sequence arrangements, etc.?

Who needs to participate in training?

Who is grouped with whom at different levels of training?

Who participates in planning the training?

Who conducts training sessions—external consultants or internal staff?

Who conducts follow-up, on-going assessment, and revisions of training?

Who is already present in the system who could contribute to training?

What is the Substance of Training?

What methods and resources are used in training?

What sequence is planned for training?

What combinations of activities are appropriate for different stages of training?

What resources support the training process—release time, funds for developing materials or hiring consultants, etc.?

What resources exist within the district already that can be tapped for training?

Can materials be developed within the district, or must prepared materials be used?

What are the goals of each training component?

What practice opportunities are built into training?

What kinds of interaction between participants is built into training?

What occurs during training sessions—discussions, hands-on activities, planning, lectures, demonstrations, role-plays, etc.?

What follow-up and evaluation of training is planned?

What help is provided to participants for producing clear and specific written evaluations?

What additional (peripheral) supports are needed by participants, such as time management skills, conflict management skills, stress management skills, and how are these needs met?

What kinds of administrative support and commitment are provided to ensure the effectiveness and importance of training?

How is the Training Done?

How is training designed to increase communication between constituencies?

How does training help to develop a climate that is non-threatening and open?

How does training help to relate evaluation to the total operation of the school system?

How is training designed to be attractive, useful, and comfortable for participants? How does training help to increase trust among participants?

How is training made flexible enough to adapt to changing needs?

How does training ensure that insights and skills gained will be sustained over time?

How does training promote increased understanding of what constitutes effective teaching?

How does training reflect and support the district's central philosophy of education?

How does training explain, share, and assure understanding of the evaluation process?

How does training promote shared interpretations of criteria or procedures?

How does training promote uniformity of evaluation procedures across levels, schools, evaluators?

When is Training Done?

At what points in the school year are training sessions most effective?

When does informal training take place?

When are new employees given training?

Does training take place on release time, during the summer, at regular staff meeting, etc.?

Where is Training Done?

Are training sessions held in individual buildings, at a central location, or at a retreat center?

Are all training activities held in the same location or is a variety of locations more suitable?

Is the location accessible to all participants?

This checklist can be used in two ways: using the questions as they are worked provides a framework for assessing an existing training program; changing the verb from “is” to “should” makes the questions suitable for planning.

VI. Conclusion

Without doubt, improving evaluation in Massachusetts will require training for teachers, administrators, and others. To be effective, new evaluation systems need to move from drawing board to action. In operation, evaluation systems need to be widely understood and accepted, promote faith and confidence among participants, and be built on a shared conception of what is good practice. New evaluation systems require new skills on the part of all concerned and often require the creation of new organizational patterns or characteristics. Each of these needs provides an important goal for training. Some districts may have to provide training in only one area. But most will have to start from scratch in developing their training programs.

When a district, particularly one which has not yet begun training for evaluation, looks at the task ahead, it may appear overwhelming. This section offers a starting point by identifying principles, goals, and a sequence of training. From the beginning, each district can choose methods and resources to meet its unique needs. But this task need not be done alone. Rather, districts can build networks with others to exchange sound training ideas. The report identifies a few districts that have consortium efforts underway. Consortia of districts could also be formed to pool resources for training. Generally, a more extensive effort to identify existing resources must be made. Our report is only a first step.

In summary, the task of developing evaluation training programs may appear overwhelming, but it is possible — with patience and effort - and with cooperation between districts.

SECTION VII

LEGAL ASPECTS OF EVALUATION

I. INTRODUCTION

This section will discuss the impact of judicial decisions and administrative agency decisions in Massachusetts on the evaluation of educational personnel. The courts and the Massachusetts Labor Relations Commission generally address this subject in response to a complaint that the evaluation process has resulted in adverse action taken against an employee. Therefore, this section will provide a broad outline of existing state law on the demotion or termination of educational personnel, both tenured and non-tenured, and set out guidelines for complying with the relevant statutes, case law and agency decisions.

It cannot be stressed too strongly that the provisions of any applicable collective bargaining agreement must be followed by anyone involved in this area. The collective bargaining agreement may alter some of the following general statements.

II. MASSACHUSETTS STATUTES

The basic statutes governing decisions on evaluation, retention or termination of school committee employees are Massachusetts General Laws Chapter 71, Sections 37, 41, 42 and 42A. Section 37 provides that the school committee "shall have general charge of the public schools. . ." and has been interpreted as affording the school committee broad powers over all aspects of public elementary and secondary education. Section 41 is the statute that establishes tenure for teachers and principals while Sections 42 and 42A set out the procedures to be followed in the event of discharge of teachers and superintendents and the demotion of principals and supervisors, respectively. These are set out in full in the appendix.

The power of a school committee to evaluate its personnel has not been challenged. The rationale behind this is that the school committee, which has broad managerial powers as provided in G.L. c.71, s.37 and cases decided thereunder, is the ultimate decision-maker in this regard. What has been challenged, however, is the *manner* in which an evaluation system has been imposed or implemented. *See, e.g., School Committee of West Bridgewater v. West Bridgewater Teacher's Ass'n.*, 372 Mass. 121, 360 N.E. 2d 886 (1977), *Burlington School Committee*, 6 MLC 1834 (1980), and *Newton School Custodians*, 4 MLC 1334 (1977), *aff'd in part*, 5 MLC 1016 (1978).

Sections 41, 42 and 42A of Chapter 71 may be classified as "procedural" rather than "substantive". Nowhere do any of these statutes regulate or in any way refer to the evaluation of educational personnel. Instead, these statutes require that the school committee provide due process to certain employees who are to be terminated or demoted. That is, they must receive notice of the intended action and the reasons therefore, they must be afforded an opportunity to be heard by the school committee, and the reasons for the school committee's action must be substantiated.

Massachusetts courts have strictly applied the procedural safeguards contained in G.L. c.71, ss. 41, 42 and 42A. See *Glennon v. School Committee of Boston*, 1978 Mass. Adv. Sh. 2039 378 N.E. 2d 1372 (1978); *Nutter v. School Committee of Lowell*, 5 Mass. App. 77, 359 N.E. 2d 962 (1977). In each of these cases the court found that, although the school committee had the authority to order the termination or demotion that resulted in the lawsuit, the school committee's action was invalid because the procedures set out in the appropriate statutes had not been followed.

There are some instances in which the courts will review the substance of the school committee's action even though procedural requirements have been met. One of these instances involves the teacher who claims that he or she is being singled out for disciplinary action in retaliation for exercising his or her right of free speech as guaranteed by the First Amendment to the United States Constitution. See *Pickering v. Board of Education*, 391 U.S. 563 (1968) and *Perry v. Sindermann*, 408 U.S. 593 (1972). Similarly, the courts have stated that they may review procedurally correct personnel actions to ensure that those actions were taken in good faith and that, for example, a reorganization of the school system is not a subterfuge for removal of certain personnel. See *Kaplan v. School Committee of Melrose*, 363 Mass. 362, 294 N.E. 2d 209 (1973), *Nutter v. School Committee of Lowell*, *supra*. In *Massachusetts Board of Regional Community Colleges v. Labor Relations Commission*, 1979 Mass. Adv. Sh. 1080, 388 N.E. 2d 1185 (1979) the Massachusetts Labor Relations Commission found that a termination which was allegedly based on a poor evaluation was really due to the employee's union activities. The Massachusetts Supreme Judicial Court upheld the decision of the Labor Relations Commission invalidating the termination.

III. LEGAL ASPECTS OF EVALUATION OF EDUCATIONAL PERSONNEL

Several states have recently enacted statutes or regulations requiring the evaluation of educational personnel. Some of these statutes and regulations require evaluations of all certified public school employees (*e.g.*, California and Washington), some exclude superintendents (*e.g.*, Oregon and Connecticut), others only require the evaluation of teaching staff (*e.g.* New Jersey) and others only require the evaluation of teachers and principals (*e.g.*, Louisiana).

The area of evaluation of educational personnel, like all other aspects of elementary and secondary education, varies so widely from one state to another that it is impossible to describe a common system or practice. The one trend that can be discerned is that the evaluation of educational personnel is more frequently becoming a matter for judicial review. The only clear line of judicial authority in these recent cases is that the contractual or statutory procedures must be followed if any action against an employee is taken that is based on a professional evaluation.

The legal implications surrounding the initiation of an evaluation system are mainly in the area of labor-management relations. Massachusetts General Laws Chapter 150E, Section 6 states that the public sector

... employer and the exclusive representative (or the employees) shall. . . negotiate in good faith with respect to wages, hours, *standards of productivity and performance*, and any other terms and conditions of employment. . .

[Emphasis added.]

The Massachusetts Labor Relations Commission ("Commission") is the state administrative agency which, among other things, enforces the provisions of the statute regulating labor relations in the public sector. The Commission has held that the existence and use of an evaluation system constitutes a mandatory subject of bargaining and, therefore, that unilateral action in this regard on the part of a public employer, including a school committee, would violate the Massachusetts labor relations law. While Commission

decisions do not have the legal authority of judicial decisions, courts tend to defer to the decisions of administrative agencies and not rehear the entire case. Their concern is that the administrative agency afforded the parties due process and applied the appropriate legal standard. See *School Committee of Stoughton v. Labor Relations Commission*, 4 Mass. App. 262, 346 N.E. 2d 129 (1976).

The Commission's decision in *Town of Wayland*, 5 MLC 1738 (1979), concerned the use of an evaluation system for police officers that had been introduced in 1971 but not implemented until 1978 when the employer decided unilaterally to use the system to assist in making promotion decisions. The Commission ruled that because this use would have an effect on the terms and conditions of employment, the evaluation system could not be used for this purpose until there had been good faith bargaining between the parties over the effect of the evaluation system.

The most recent decision by the Commission on the use of evaluations is the *Burlington School Committee* case, *supra*. The Burlington School Committee revised its evaluation system without choosing to bargain about this with the Burlington Teachers Association. When the School Committee attempted to implement the revised evaluation system, the Association filed a complaint with the Commission. The Hearing Officer ruled:

In order to prevail, the Association must introduce sufficient evidence to show that School Committee unilaterally altered some pre-existing condition of employment that affects a mandatory subject of bargaining. A unilateral change in evaluation procedures requires a finding of a material departure from previous procedures.

Section 6 of the Law makes it clear that the employer is required to bargain over 'standards of productivity and performance' and therefore the criteria used in evaluation procedures is a mandatory subject of bargaining. *The Commission has held that the institution of written evaluation procedures which merely measure the same criteria as that utilized in the past does not violate the Law.* The record shows and the School Committee admits that prior 1979 there was no uniform standardized system of evaluating teachers. A careful comparison of the forms in use in the past and those presently in use leads me to conclude that the School Committee has completely revamped the evaluation process. The present four-page evaluation form listing sixty-two individual criteria as a substantial departure from the former evaluation process. 6 MLC 1824, 1836-37 [Emphasis added.] [Citations omitted.]

To date, the full Commission has not ruled on the appeal from the Hearing Officer's decision in this case. However, the trend of full Commission decisions suggests it would rule that a school committee has the power, if not the duty, to establish the standards of service delivery by its staff, but when those standards affect the working conditions of the staff, this effect becomes an issue which must be bargained by the parties to any collective bargaining agreement.

Although this distinction may appear somewhat academic, it is the means by which the Commission has reconciled the broad grant of power to the school committee to control the public schools, under G.L. c.71, s.37, with the rights of all public employees to organize and bargain over employment conditions granted by G.L. c.150E. A similar analysis was used by the Massachusetts Supreme Judicial Court in *School Committee of Boston v. Boston Teachers Union*, 1979 Mass. Adv. Sh. 1238, 389 N.E. 2d 970 (1979) and cases cited therein. In that case the issue was whether the School Committee's decision to require final examinations for elementary level students was legally beyond the scope of collective bargaining. The Union argued that, given the applicable contract provisions, the school committee could not unilaterally impose such a requirement. In its decision, the court stated that there are areas of responsibility such as the development of educational policies

or the award of tenure, which a school committee may not legally bargain away. However, a school committee may legally include in its collective bargaining agreement requirements as to the procedures to be followed when implementing its policies in those areas, including procedures to be used when initiating system-wide examinations. The court mentioned, without either support or disapproval, the practice of courts in other jurisdictions to mandate:

. . . bargaining regarding the *impact* of educational policy decisions in cases where the employer normally would not be required to bargain over the decision itself.
389 N.E. 2d 970, 974 [Citations omitted.]

IV. THE USE OF AN EVALUATION SYSTEM

The cases discussed above are limited to the simple issue of whether (or when) an evaluation system can be implemented. Once that has been resolved, the next issue concerns any restrictions on the manner in which the evaluations are used by the employer.

Massachusetts courts whose decisions have statewide precedential effect (Massachusetts Appeals Court and the Massachusetts Supreme Judicial Court) have not squarely ruled on the subject of evaluation of professional personnel. However, there has been a recent decision by the Middlesex Superior Court on this issue, *Freel v. Mulready*, Middlesex Superior Court No. 77-4322, decided March 19, 1980. The plaintiff in that case challenged the results of an evaluation which she received pursuant to an individual agreement she had made with the School Committee. The issue was whether the School Committee had complied with its agreement to afford the plaintiff a "good faith evaluation of her performance." The court discussed the elements of an evaluation as follows:

The bargain which Plaintiff and Defendants struck in 1974 bound Defendants not only to weigh Plaintiff's abilities, but to weigh them in a forthright manner. "Evaluation", as that word appears in the Release which Defendants drafted, means at least a reasoned and objective measuring of Plaintiff's skills against previously-selected recognized (and recognizable) standards.

This is not to say that Defendants must employ any given set of criteria; still less that they must use a scoring system. Teaching, like any other art, does not lend itself to quantification. But an absence of precision in data-gathering does not warrant vagueness in criteria. Plaintiff is entitled to require that in judging her, Defendants measure her competence by something considerably more definite than feelings, instincts, or beliefs, no matter how sincerely Defendants may hold them.

Defendants, in short, must be prepared to express concretely, in advance of its application, every criterion they propose to employ. They must also stand ready to state in reasoned manner the extent to which Plaintiff's abilities meet or miss each such mark.

Under the circumstances of this case, Defendants owed Plaintiff not merely a disinterested examination of her professional competence, but also a clear written statement of the conclusions the examination produced and the reasons behind each of these conclusions. The brief and often amorphous evaluation reports fell far below these requirements.

Decision of March 19, 1980, pp. 8 & 9

While the elements of the evaluation required by the *Freel* court are expressly limited to “the circumstances of this court. . .,” they do provide a guide as to what a judge considers the necessary elements of an evaluation.

Unlike some states such as California and New York, there is no statutory requirement in Massachusetts that school committees make reduction in force decisions on the basis of seniority. See Massachusetts General Laws, Chapter 71, Section 42. A Massachusetts school committee could decide to use the results of a valid evaluation system to make those decisions. If there is a collective bargaining agreement between the school committee and the persons to be affected by the evaluation system, provisions regarding the use of that system to make reductions in force must be the result of the bargaining process. See pp. 3-6 *supra*. If there is no applicable collective bargaining agreement, it appears that the evaluation system should at least meet the standards discussed in *Freel, supra*.

V. DUE PROCESS REQUIREMENTS

The courts have not yet ruled on what is required if an employee who has been evaluated pursuant to the *Freel* standards disagrees with the substance of that evaluation and there is no applicable procedure specified in a collective bargaining agreement. In a case involving the termination of a *student* on the basis of an evaluation of her academic performance, the Supreme court of the United States declined to require that she receive a hearing before school officials on the *substance* of the complaints. (The Court did note with approval that the appropriate procedures had been followed.) See *Board of Curators, University of Missouri v. Horowitz*, 435 U.S. 565 (1978), this is in contrast to the situation in which students are suspended for misconduct. In that case, they are entitled to receive a hearing on the substance of the complaints. See *Goss v. Lopez*, 419 U.S. 565 (1975). It is not clear if that analysis will be extended to the issue of adverse action taken against an employee on the basis of an unfavorable evaluation.

While a school committee may use the results of an employee’s evaluation to support its decision to demote or terminate that employee, any such action must adhere to both the requirements imposed by statute and any applicable collective bargaining agreement.

Massachusetts law requires that a tenured teacher or superintendent or a superintendent whose contract has not expired can only be terminated by a two-thirds vote of the school committee and then only for “inefficiency, incapacity, conduct unbecoming a teacher or superintendent, insubordination or other good cause. . .” M.G.L. c.71, s.42. That statute further requires that:

- (1) the employee receive thirty days notice of the intended vote by the school committee;
- (2) the employee receive, if he or she so requests, a written statement of the reasons for which the termination is contemplated;
- (3) the employee receive, if he or she so requests, a hearing before the school committee at which he or she “may be represented by counsel, present evidence and call witnesses to testify in his behalf and examine them”;
- (4) the charges must be substantiated; and
- (5) if the employee is a teacher, the superintendent must give the school committee his or her recommendation.

Similar protections are afforded a "principal, supervisor, assistant principal or professional employee performing the duties of a principal, supervisor, assistant principal, by whatever title his position may be known. . . ." M.G.L. c.71, s.42A. Aggrieved parties may appeal school committee decisions regarding demotion and termination to superior court. See M.G.L. c.71, s.43A.

An open question is what will happen if school committee that is terminating a teacher wishes to do so in a private session as it may, pursuant to M.G.L. c.71, s.42, and the teacher in question wishes to have this done in public session, as she or he may require pursuant to the "Open Meeting Law," M.G.L. c.39, s.23B, or *vice versa*. In considering a related issue, the Middlesex Superior court ruled that School Committee discussions regarding the strategy employed in reduction in force, including the application of the strategy to individual teachers, could legally be held in executive session. See *Cantor v. Evans*, Middlesex Superior Court No. 79-4865, decided October 12, 1979.

VI. CONCLUSION

Massachusetts law affords school committees wide discretion in determining how to operate their schools, including the discretion to set and enforce reasonable standards to be met by educational personnel. One of the points at which the statutory authority of school committees to determine educational policy intersects with the rights of public employees to bargain over the terms and conditions of their employment is the issue of evaluation of educational personnel. This remains one of the major unresolved issues in the field of public employment. The restrictions that have been imposed are, for the most part, of a procedural nature and do not attempt to superimpose the judgment of the reviewing court or administrative agency over that of the school committee. Perhaps because the review is not a substantive one, to date the court and agency decisions have relied heavily on whether the procedural requirements contained in statutes or collective bargaining agreements have been met.

SECTION VIII

MODEL EVALUATION PLANS: MASSACHUSETTS AND OUT-OF-STATE SCHOOL DISTRICTS

Fourteen examples were selected by the Study Committee because they provide evidence that local school districts have developed evaluation systems to enhance professional growth and improve instruction. The individual plans were developed to meet the needs of the particular school district and do not necessarily fit all of the Study Committee's principles (Section II). These examples were chosen as models of evaluation methods used in diverse communities, and their inclusion does not mean complete endorsement by the Study Committee.

The Committee and staff reviewed over three hundred examples which were submitted or discovered during the process of studying evaluation plans. The fourteen models were chosen because they are used in school districts of varying sizes, small rural districts to large city systems. The examples are from the following districts:

Baltimore, Maryland
Barnstable, Massachusetts
Brookline, Massachusetts
Cambridge, Massachusetts
Charlottesville, Virginia
Denver, Colorado
Fort Thomas, Kentucky
High Point, North Carolina
Longmeadow, Massachusetts
Newton, Massachusetts
Prince William County, Virginia
Reading, Massachusetts
Westborough, Massachusetts
Westport, Connecticut

Space limitations only allow brief summaries of the model evaluation plans, but the plans in their entirety are reproduced in the "Supplement to the Report of the Study Committee on Evaluation of Educational Personnel". A copy of the "Supplement" will be sent to each Massachusetts school superintendent for reference. Any district desiring to adapt a specific plan should seek the permission of the school district cited.

The following summary lists the major sections of each evaluation plan and can be used as a guide to the materials. The order is alphabetical as listed above.

BALTIMORE CITY PUBLIC SCHOOLS

Baltimore, Maryland

Procedures for Evaluation of Teaching Staff

Philosophy and Rationale

Criteria and Indicators for Teacher Evaluation

Evaluation Cycle

Explanation of Observation, Conferences, and Records

Forms to be used:

Teacher Evaluation Forms

Observation Notes-Worksheet

Conference Notes

End of the Year Report

Guidelines for Recommended Actions

Procedures for Evaluation of Department Heads/Senior Teachers

Philosophy

Evaluation Procedure: cycle of reports

Performance Criteria and Indicators

Forms to be used:

Evaluation Forms

Conference Forms

Recommended Actions

Procedures for Evaluation of Regional Specialists

Philosophy

Evaluation Procedure: cycle of conferences and reports

Performance Criteria and Indicators

Forms to be used:

Evaluation Forms

Conference Forms

Recommended Actions

Procedures for Evaluation of Educational Specialists

Philosophy

Evaluation Procedure: cycle of reports

Evaluation Criteria and Indicators

Forms to be used:

Evaluation Forms

Final Evaluation Form

Recommended Actions

Procedures for Evaluation of Coordinators

Philosophy

Evaluation Procedure: cycle of reports

Performance Criteria and Indicators

Forms to be used:

Evaluation Forms

Conference Report Forms

Recommended Actions

Performance Evaluation of School Based Administrators

- Philosophy

- Administrator Evaluation Procedure: cycle of reports

- Performance Criteria and Indicators

- Forms to be used:

 - Worksheet for Submittal to Superior

 - Conference Reports

 - Performance Criteria Rating Sheet

 - End of Year Conference Report

 - Recommended Actions

BARNSTABLE PUBLIC SCHOOLS

Barnstable, Massachusetts

PROFESSIONAL EVALUATION SYSTEM

Introduction (statement of concepts used)

Rationale

Barnstable School Committee Teacher Evaluation Policy

Administrative Regulations

- Discussion of phases, timetable, process, monitoring and data collection, evaluation conference

Job Target Development

- Discussion of job targets and examples of job targets

Forms:

- Teacher Evaluation Report-Non-Tenure Staff

- Tenure Staff Evaluation

A Guide to Self-Evaluation: includes Self-Appraisal Form

Philosophy of Education and Goal Statements Developed by Students, Community and Staff

- Form for School Goals, Department/Program/Team Goals

Job Descriptions

- Primary Grade Teacher

- Intermediate Grade Teacher

- Middle School Teacher

- High School Teacher

Employment Procedures

- Phase III on Notice of Employment Status (used with people with whom the school system has specific concerns of a serious nature relative to withholding increments or dismissal)

- Form for Confidential File

Administrator Evaluation

- Describes process, instruments, monitor, types of job targets, who evaluates whom

Description of Teacher Evaluation-Shared Personnel and who evaluates whom

Policy on Coaches Evaluation, Expectations of Coaches and Evaluation Form

BROOKLINE PUBLIC SCHOOLS

Brookline, Massachusetts

Evaluation and Supervision

- A. Non-Tenure Teachers - description of the process and cycle
- B. Tenure Teachers - description of the process and cycle
- C. Administrators, Tenure and Non-Tenure - description of the process and cycle

Forms:

Annual Report of Teacher Effectiveness

Staff Progress Report

Evaluative Criteria - characteristics of exceptional teaching:

- I. The Director of Learning
- II. The Counselor and Advisor
- III. The Mediator of Culture
- IV. Member of the Staff
- V. The Liason With the Community
- VI. The Teacher As A Professional

Additional Forms:

Evaluation of Supervisor
Parent Comment Sheet
Student Comment Sheet - High School

CAMBRIDGE SCHOOL DEPARTMENT

Cambridge, Massachusetts

Introduction: describes purpose of evaluation in Cambridge and focus of program

Definition of terms used in the evaluation process

Description of the total cycle along with the time line and procedures for:

non-tenured teachers (through the third year)

tenured teachers (one year cycle) with appropriate forms

Teacher Evaluation Forms
Monitoring Log Sheet
Goal-Setting Form
Progress Review
Teacher Evaluation Process Schedule
Optional Forms:

Teacher Self-Analysis

Student Perception of Teacher-Primary Level, grades 4-8,secondary,
Form For Tabulation of Results of Student Questionnaires

Tenure Forms
Reappointment Form

Administrative Evaluation Process

Philosophy and Purpose: cycle of evaluation
Who evaluates whom
Process for newly appointed administrator
Evaluation Process, explanation of form to be used
Staff Feed Back to Supervisors, description of mechanism and form
Check List for Self Appraisal
Goal Setting Agreement
Progress Review Form
School-Administrator Matrix Evaluation
Charts Showing Description of Staff Feed Back Forms, Elementary Level,
Secondary Level, Central Office

CHARLOTTESVILLE PUBLIC SCHOOLS Charlottesville, Virginia

AN INSTRUMENT FOR APPRAISING THE EFFECTIVENESS OF PRINCIPALS

Objectives: 10 objectives of the Charlottesville Schools
Role Expectations for Principals: areas outlined -
Business Management
Curriculum and Instruction
Professional Growth
Pupil Personnel
School-Community Relations
Staff Personnel

Performance Criteria:

- Develop Annual School Plan
- Develop Handbook of Policies and Procedures
- Coordinate Services of Persons Working in the School
- Assign Pupils to Classes, Programs, and Activities
- Provide Instructional Materials and Equipment
- Evaluate Pupil Progress and Instructional Effectiveness
- Supervise Instruction and Assist Teachers
- Provide for Cooperative Evaluation Program

Process: Cycle for evaluation and forms

- Survey Form (optional for use with staff)
- Survey Form (optional form to be used with students)
- Diagnosis of Principal Performance
- Listing of Performance Objectives
- Self-Evaluation of Objective Achievement
- Evaluator's Assessment of Achievement
- Annual Performance Appraisal for Principals

AN INSTRUMENT FOR APPRAISING THE EFFECTIVENESS OF THE SCHOOL SUPERINTENDENT

Guideposts for Evaluation

Evaluation Form: Areas of Responsibility

- Relationships with the Board
- Community Relationships
- Staff and Personnel Relationships
- Educational Leadership
- Personal Qualities

AN INSTRUMENT FOR APPRAISING THE EFFECTIVENESS OF DIRECTORS AND SUPERVISORS

Evaluation Procedure and Purpose

Evaluation Form: Areas of Responsibility

- Relationships with the Superintendents or appropriate Assistant Superintendents
- Community Relationships
- Staff and Personnel Relationships
- Educational Leadership
- Administration, Business and Finance

Composite Profile of Evaluation of Directors and Supervisors by Professional Colleagues

DENVER PUBLIC SCHOOLS

Denver, Colorado

Introduction - essential uses of appraisal:

- Performance improvement
- Motivation toward achieving personal and system goals
- Discovery of abilities
- Self-development
- Discovery of educational/professional needs
- Facilitate understanding between supervisor and subordinate
- Determine career potential
- Guidelines for transfer, promotion, reassignment
- Guide for salary determination

Present Appraisal Practices - cycle for appraisal of *all* employees of the District, professional and non-professional, tenured and non-tenured

TEACHER PERFORMANCE APPRAISAL

Appraisal-outlines need for appraisal, purposes of appraisal, appraisers, appraisal process, appraisal procedure:

- stating mutually agreed upon measurable goals
- devising means of accomplishing the goals
- determining methods of evaluation progress toward goals
- planning for communication
- sumarizing progress in appraisal statement

Appraisal Forms

Form covering management skills, control of learning environment, instruction, personal qualities, human relationships, lesson planning

Teacher Performance Appraisal

Tenure Teacher Appraisal

ADMINISTRATOR APPRAISAL

Purpose of administrative appraisal

Guide to appraisal process-sets up three categories;

Management Area-Management Skills-Performance Skills to be used for Central Office Level, Building Level

Appraisal Procedure-pre-evaluation conference, evaluation post evaluation conference, follow-up action, job targets, time line and summary

Forms for Summary of Appraisal, evidence of outstanding performance, notification of unsatisfactory performance

FORT THOMAS CITY SCHOOLS

Fort Thomas, Kentucky

Introduction -explains objectives of the total system and perspective of clinical supervision

Purposes of Evaluation and Schematic diagrams of models, definitions of roles of Evaluator, Contributor, Assistant Principal, Supervisor of Instruction, Department Head, Principal, Superintendent

Frequency of Evaluations, Evaluation Timetable, Who Evaluates Whom

Evaluation Process

Performance Criteria:

Teachers:

Instructional Knowledge and Skills

Student Management

School/Community Relations

Professional Growth and Responsibilities

Utilization of Resources

Instructional and Administrative Leadership (for Department Heads and Teacher Coordinators Only)

Administrators:

Instructional Leadership

Pupil Personnel Services

School/Community/Public Relations

Professional Growth and Responsibilities

Personnel Management

Health and Safety Management

General and Business Management

Personal competencies

Evaluation Cycle:

Step 1 Review Performance Criteria

Step 2 Identify Needs or Areas to Emphasize (with forms)

Step 3 Finalize Objectives and Action Plans

Step 4 Initiate Implementing Process (with form)

Step 5 Hold Interim Conference/Complete Implementation

Step 6 Make Assessments (with form)

Step 7 Hold Culminating Conference

Adjustment Process

Definition of Terms

HIGH POINT SCHOOLS
High Point, North Carolina

TEACHER EVALUATION PROCEDURES

Statement of philosophy of teacher evaluation
Overall and specific purposes of evaluation

Steps in Teacher Evaluation Process

Pre-Evaluation Preparation

- present evaluation program to staff
- conduct city-wide orientation
- hold pre-observation conference

Implementation Process

- conduct initial observation and share observation report
- hold follow-up conference (if requested)
- conduct additional observation and follow-up

Evaluation Process

- complete summary evaluation report-hold summary evaluation conference

Evaluating Unsatisfactory Teaching Performance

Forms: Work Plan Form (option of teacher), Observation Report, Summary Evaluation Report

Evaluative Criteria, Explanations-Definitions

ADMINISTRATOR EVALUATION PROCEDURES

Introduction and explanation of purposes of evaluation plan

- promote improvement of administrator and supervisor performance and motivate professional growth and development

Three Phase Evaluation Model-cooperative process

Planning Phase

Achieving Phase

Assessing Phase

Who Evaluates Whom

Sample Objectives and Action Plans

Collecting Evaluative "Data"

Evaluating Performance That is Considered Below the Satisfactory Level

Adjustment Process (to resolve differences) and Appeal Process

Forms for Need Identification and Objective/Action Plan, Suggestions Made by Contributor,
Summary of Contracts, Summative Evaluation Report

LONGMEADOW PUBLIC SCHOOLS

Longmeadow, Massachusetts

TEACHER EVALUATION PROCEDURES

Pre Observation Conference-outline of procedures

Post Observation Conference

What Goes Into the Personnel File

Tenured Teachers Not to be Re-employed or to Have a Salary Step Withheld Due to Performance (Except for RIF)

Teacher Evaluation - Performance Indicators

- Up-to-Date Knowledge of Subject

- Preparation of Lesson Plan

- Use of New and Varied Materials and Equipment

- Effectiveness of Instruction

- Enthusiasm

- Control of Students

- Rapport with Students

- Rapport with Parents

- Rapport with Staff

- Rapport with Administrators

- Contributes to Students Beyond the Classroom

- Contribution to the School and/or Teaching Profession

- Enforcement of and Compliance with School Regulations

Categories and Criteria of Teacher Performance

- Productive Teaching Techniques

- Positive Interpersonal Relations

- Organized, Structured Class Management

- Intellectual Stimulation

- Desirable Out-of-Class Behavior

Forms for Pre and Post Observation Conference, Performance Report for Non-Tenure teachers, for tenure teachers

PERFORMANCE APPRAISAL OF THE SUPERINTENDENT OF SCHOOLS

Evaluation Criteria

- Relationship with the Committee

- Community Relationships

- Staff and personnel relationships

- Educational Leadership

- Business and Finance

- Personal Qualities

Purposes of Evaluation

Who Evaluates and How Often

Guideposts for Evaluation and Procedures

Job Description

NEWTON PUBLIC SCHOOLS

Newton, Massachusetts

EXPLANATION OF TENURED STAFF EVALUATION

Forms

For Observations and Conferences

Evaluation of the Non-Tenure Teacher

Supervision and Evaluation of Tenured Teachers

EVALUATION OF SCHOOL PRINCIPALS

Procedures

Criteria for Evaluation

Knowledge of teaching methods and techniques

Familiarity with good administrative practices

Ability to get along with people

Skill in written and oral communications

Awareness of the need to evaluate the effectiveness of school programs and to make appropriate changes

Capacity to stick to a job in spite of difficulty

Willingness to delegate authority

A feeling, always present, that the principal must account for decisions and practices

Specific Guidelines

Program Leadership

Relationships with Staff and Students

Relationships with Parents and Community

Evaluation of School Principals in a Probationary Status

EVALUATIVE CRITERIA FOR COORDINATORS

Curriculum development and improvement
Staff development-Improvement of instruction
Program evaluation
Administrative competence: within Education Center and system-wide
Professional relationships
Leadership

Forms for
Housemasters
Department Heads

PRINCE WILLIAM COUNTY PUBLIC SCHOOLS **Prince William County, Virginia**

Puposes of Evaluation

Overall Purpose: The primary purpose of evaluation is to promote improvement and professional growth so that the teaching/learning process and services to students will be more effective and will more nearly achieve division, school, and individual goals and objectives.

Spcific Objectives

1. Improve communication
2. Increase the capabilities of individuals to analyze needs and establish objectives
3. Provide special assistance to individuals new to the system and to those in probationary service status
4. Define dimensions of deficiency, when circumstances require, so that they will conform to requirements of due process
5. Evaluate performance in terms of duties for which the individual can be realistically and reasonably held accountable

Definition of Terms

Relation of Standards of Quality and Objectives for Public Schools in Virginia to Individual Goals and Objectives

Definition of Roles

Frequency of Evaluations and Evaluation Phases (Seven Phase Process)

Phase 1 - Planning Stage

Review Results of Previous Year
Diagnose Needs for Current Year
Diagnosis of Status of Current Performance (form)

Phase 2 - Planning Stage

Evaluatee and Evaluator confer Regarding Needs of Evaluatee
Specific Objective/Action Plans

Phase 3 - Implement Action Plans

Phase 4 - Interim "check up" conference and make any changes in objectives and action plans (form)

Phase 5 - Continue the Implementation of Action Plans

Phase 6 - Complete Assessment of Results (a) self, (b) evaluator, (forms)

Phase 7 - Hold Culminating Conference to Analyze Results and Make Preliminary Plans for Coming Year

Appeal Adjustment Process

READING PUBLIC SCHOOLS

Reading, Massachusetts

EDUCATION-BY-OBJECTIVES

Introduction and explanation of the system

Communicating about Teaching Performance: The Education-by-Objective Process

Education By Objectives Step-by-Step

1. Clarify the Responsibilities of the Teacher
2. Establish Performance Objectives
3. Carry Out An Action Program
4. Assess Performance Results

General Philosophy of the Reading Public Schools

Appraisal of Staff by Education-By-Objectives - Recent Activities

Appendices

I Sample List of Performance Criteria for Teachers

II Form for Performance Evaluation

Evaluation of the Superintendent

General Structure for Education-by-Objectives Process

Characteristics of Education-By-Objectives Activities for Teachers at Different Stages of Experience or Status

Administrative Summary of Education-By-Objectives

WESTBOROUGH PUBLIC SCHOOLS

Westborough, Massachusetts

Statement of Purpose

Eight Major responsibility Areas of Teaching

1. Pupil-Teacher Relationships: 5 items
2. Techniques of Instruction, Preparation and Planning: 10 items
3. Pupil Evaluation: 4 items
4. Personal Qualities: 5 items
5. Knowledge of Subject Matter: 1 item
6. Class Management: 3 items
7. Curriculum Development: 4 items
8. Staff Relations and School-Wide Effectiveness: 7 items

Additional items and procedures to us on the Cumulative Teacher Evaluation Record

Frequency of conference

Process for use of the evaluation and recommendation

Observation and classroom visit procedure

Cumulative Teacher Evaluation Record Form

Form for Recommendation for Reappointment of Non-Tenure Teacher

Form for Continuance on Tenure

Form for Department Head/Team Leader Evaluation Record

Form for Administrator Evaluation

WESTPORT PUBLIC SCHOOLS

Westport, Connecticut

Introduction, Goals and Rationale of the Professional Development and Appraisals Program

Statement of Goals of Program

rationale of the process and discussion of goals, mutual agreements and meshing of goals

Schematic description of the Process of Individual Development and Appraisals

Biennial Cycle for Organizational Objectives

Implementing the Program

Scope of Involvement of Staff and Board

Procedural Requirements

Responsibilities for Development and Appraisals of Individual Staff

Elementary School Level

Junior High Level

Senior High Level

Pupil Personnel Services

Staff Assigned to More than One Building or Level

Administrators

Operational Procedures for Non-Tenure Staff

First Year

Second Year

Third Year

Operational Procedures for Tenure Staff

Phasing into the Goal-Setting Process

Continuing in the Goal-Setting Process

Operational Procedures for Administrators

First Year Administrators

continuing Administrators

Conflict Resolution

Operational Procedures for Hiring New Staff During School Year

Elementary School Level

Junior High School Level

Senior High School Level

Pupil Personnel Services

Candidates Assigned to More than One Building or Level

Training Requirements

Training Goals for Staff

Training Goals for Supervisors

Training Schedule

Provisions for Released Time

Role of In-House consultant: designated by Superintendent, responsible for working with Joint Committee to plan, conduct training workshops, working with supervisors, helping with team-building, etc.

Basic Evaluation Criteria for Teachers

Basic Evaluation Criteria for Administrators

Basic Evaluation Criteria for Counselors

Long Range Goals of Westport Public Schools

Goal Activities Record Form

SECTION IX

COMMITTEE PROCEDURES

FOLLOWED FOR THE STUDY

The Study Committee began its work on November 15, 1979 and held regular meetings on the fourth Thursday of each month. A special all-day meeting took place on April 24 and an extra session on June 12. In addition two public forums were held, March 13 in Framingham and March 27 in Holyoke. A public hearing on the Committee recommendations was held on May 21 in Lexington. The official minutes of the meetings and transcripts of the public hearings are available in the Commissioner's Office.

During the course of the committee deliberations, the group was addressed by the following persons: (in order of appearances)

Terrence Deal, Harvard Graduate School of Education faculty member
James Case, Director of the Bureau of Teacher Certification
Richard Cerrato, Housemaster, Granby Middle School
Robert Munnelly, Assistant Superintendent, Reading
John Morabito, Principal, J. Warren Killam Elementary, Reading
John Delaney, Principal, W.S. Parker Junior High, Reading
Ellen Svenson, Department Head, A.W. Coolidge Jr. High, Reading
Gail Amiralian, Killam Elementary, Reading
William Flaherty, Superintendent, Billerica
Gordon Bruno, Superintendent, Wellesley
James Kennan, Superintendent's office, Waltham
Richard Krystal, Director of Staff Management, Quincy
Bernard Shulman, Superintendent, Canton
Ralph Toran, Holliston Middle School
William Sheridan, Director of Personnel, Brookline
Lynn Ann Reagan, President, Framingham Teachers Association
Robert McKanna, Superintendent, Longmeadow
Gordon Spence, Superintendent, Sutton
Chris Grammaticas, Superintendent, West Springfield
Michael Ronan, Director of Curriculum, Lee
Henry Reiner, School Committee, Lee
Maurice Boulanger, Superintendent, Lee
Stanley Mulak, Science Supervisor, Springfield
Martin Manoogian, Teacher, Springfield
Dan Smith, Teacher, Westfield
Ronald Morrison, President, Reading Teachers Association
Patricia Gagnon, Teacher, Wilmington
Ernest Zaik, Assistant Superintendent, Lawrence
Barbara Schnuer, Massachusetts League of Women Voters

Kenneth Stephens, Superintendent, Bedford
Timothy Conners, Principal, Wellesley High, representing Massachusetts
Secondary School Administrators Association
Leon Pierce, Superintendent, Concord/Carlisle
Nancy Haley, Teacher, Lexington
Peter Farrelly, Assistant Superintendent, Wachusett Regional
Jack Gouveia, Teacher, Natick
Beverly Jarnagin, School Committee, Concord
Thomas Johnson, Personnel Director, Needham
Joseph Keefe, Superintendent, Natick
Roger Smyth, Superintendent, Chelmsford
Jo Ann O'Malley, President, Quincy Education Association
Margaret King, Math Department Head, Quincy
Barry McNiff, Teacher, Ayer, member Massachusetts Teacher Retirement Board
Ellen O'Brien, President, Massachusetts Teacher Association
Arthur Middleton, Assistant Superintendent, Dartmouth
Howard Greis, Holden, (State Board of Education but appeared as concerned citizen)

Several communications were sent to superintendents and school committee chairpersons to inform them of the creation the Study Committee, request information on evaluation practices, send the draft principles and recommendations and notify them of the public sessions. Many representatives of school districts and education organizations wrote to the Commissioner and/or the Study Committee sharing their opinions on the issue of evaluation.

The members of the Committee reviewed research findings on evaluation and materials from education associations, evaluation specialists and other departments of education. The principles and recommendations were the result of many hours of discussion and represent the cooperative efforts of the Committee. All of the decisions taken were unanimous and were reached through a process of consensus; thus, there are no minority reports.



Gregory R. Anrig, Commissioner of Education

The Commonwealth of Massachusetts

Department of Education

31 St. James Avenue, Boston, Massachusetts 02116

STUDY COMMITTEE ON EVALUATION OF EDUCATIONAL PERSONNEL

The Study Committee on Evaluation of Educational Personnel is appointed by the State Board of Education to advise the Board, local school officials, and the general public, on ways to improve the evaluation and performance of educational personnel. The Study Committee should:

- * Review current practices and identify, on the basis of these practices and relevant research, principles which underlie sound evaluation procedures for educational personnel.
- * Provide a forum for the identification of evaluation practices in Massachusetts and elsewhere which are considered effective and equitable by those affected by the practices.
- * Elicit from educational and other interested organizations and individuals ideas for the improvement of the evaluation of educational personnel in Massachusetts.
- * Identify and recommend information to be disseminated on evaluation practices in Massachusetts and nationally which demonstrate the principles of sound evaluation and performance improvement deemed most important by the Study Committee.
- * Submit to the State Board of Education a report of findings, conclusions and recommendations by no later than June 1980.

Effective and equitable evaluation of educational personnel is important at any time. It is especially important at a time of increasing enrollment declines, growing budget constraints, and public questioning of the quality of education. It is the Board's intent in forming this study committee to identify problems in present practices of evaluation and to suggest promising evaluation practices, already operating in Massachusetts and nationally, for consideration by all parties concerned at the school district level. In this way, the Study Committee will achieve the Board's sole objective in this effort -- the improved evaluation of educational personnel in Massachusetts.

The Study Committee will be representative of teachers, school committee persons, superintendents, principals, parents and students. Two legislators will be invited to participate from the Joint Education Committee. The Commissioner of Education will serve as Chairperson, assisted by the Executive Deputy Commissioner. Staff assistance to the Study Committee will be provided by the Department of Education's Office of Executive Planning. A limited budget also will be provided for consultants.

Approved by: Board of Education
September 25, 1979

Standards for Certification

In 1979 the Board of Education adopted a new set of comprehensive regulations for the certification of educational personnel. These regulations are based on five standards (see below), each of which is broken down into several more specific competencies. Under these regulations, certification is ultimately determined on the basis of an evaluation of the candidate's performance in the classroom by the cooperating practitioner and the college supervisor. The criteria for this evaluation are the competencies listed under each standard.

School systems in Massachusetts which are establishing or modifying their own criteria for evaluating educational personnel already hired might be well advised to consider using the state standards for certification as the core of their own evaluation system. There are several good reasons for this suggestion:

1) By the end of the 1982-83 academic year, all teacher preparatory programs in Massachusetts will be based on these standards. To the degree that school systems also adopt the standards, we would establish real continuity between preservice training and inservice performance -- a continuity which does not now exist.

2) This continuity would enable individual teachers to measure their growth on-the-job against the same criteria used to measure the effectiveness of their preparation.

3) It would also have the effect of increasing the consistency between the evaluator's expectations and the evaluatee's, of making these expectations less dependent on temporary concerns or educational fads, and thereby increasing the reliability of evaluation.

4) Further, this consistency in evaluation could foster a state-wide consensus on the common or universal elements in good teaching, counseling, and administration -- a consensus which could in the long run help to ensure a better match between what a teacher is trained by the college to do and what a teacher is expected by the school to do.

5) Although the certification standards are designed to evaluate inexperienced teachers, counsellors and administrators, they can be easily adapted or modified to evaluate experienced personnel.

4. understands developmental psychology, and relationships between stages of growth
 5. uses materials, media, and techniques appropriate to the age, developmental stage, special needs, and social, racial and linguistic background of his or her students, both individually and as a class
 6. uses materials, media, and techniques suited to the subject matter and to meeting the goals of instruction
 7. teaches, as necessary, the basic academic skills (reading, communication, mathematics) related to the goals of instruction
 8. is aware of recent developments in teaching, particularly in his or her field(s) of knowledge
 9. understands techniques of classroom management and how to understand a sense of order in the classroom
 10. makes effective use of appropriate resources in the community
- (d) Standard IV. The effective teacher uses the results of various evaluative procedures to assess the effectiveness of instruction. To meet this standard, the candidate will demonstrate that he or she:
1. uses evaluative procedures appropriate to the age, developmental stage, special needs, and social, racial, and linguistic background of his or her students, and corrects for any ethnic, racial, or sexual bias in evaluation
 2. interprets the results of evaluative procedures, and uses these results to improve instruction both for the class as a whole and for individual students
 3. identifies problems in reading which inhibit learning and works toward remedying these problems
 4. encourages the involvement of students in evaluation of instruction
 5. evaluates his or her own role, behavior, and performance in the classroom
- (e) Standard V. The effective teacher is equitable, sensitive, and responsive to all learners. To meet this standard, the candidate will demonstrate that he or she:
1. defends and encourages the exercise of students' rights to equal treatment and freedom of expression
 2. responds to the needs of individual students so as to enhance their self-esteem
 3. works toward a learning environment favorable to open inquiry and devoid of ridicule
 4. encourages a positive atmosphere for all students, especially those with special needs
 5. avoids and discourages racial, sexual, social, ethnic, religious, physical, and other stereotyping

6) Finally, it would be difficult and costly for individual school systems to develop by themselves a comprehensive set of criteria. Several years of work by several hundred educators went into developing the certification standards; they incorporate a wide range of opinion and reflect a wealth of field experience.

The five standards listed below are only the common standards for regular classroom certificates. Standard I (the field of knowledge) varies for each teaching field, and all of the standards vary for certificates in administration, counselling, special education, and other specialized areas. The complete regulations are available from the Department.

(2) Classroom Teacher. (Common Standards)

(a) Standard I. The effective teacher is knowledgeable in the field proposed for certification. (The competencies required to meet this standard are listed under each classroom teaching certificate.)

(b) Standard II. The effective teacher communicates clearly, understandably, and appropriately. To meet this standard, the candidate will demonstrate that he or she:

1. gives clear and concise explanations and directions
2. frames questions so as to encourage inquiry
3. uses appropriate metaphors, examples, and illustrations
4. makes the goals of teaching and learning clear to students
5. uses language appropriate to the age, developmental stage, special needs, and social, racial, and linguistic background of his or her students
6. serves as an example of clear and effective oral and written communication
7. listens to students
3. communicates effectively with parents

(c) Standard III. The effective teacher designs instruction to facilitate learning consistent with the needs and interests of the learners and so as to maintain a sense of order and purpose in the classroom. To meet this standard, the candidate will demonstrate that he or she:

1. understands the needs and interests of his or her students and designs or adopts the curriculum to meet these needs and interests
2. has clear goals for student learning.
3. relates the elements of instruction sequentially to each other, to other fields of knowledge, to students' experiences, and to long-term goals

6. makes allowances for biases and limitations in his or her own background which limit his or her responsiveness to students from other backgrounds.

(48) School Principal (N - 6) (5 - 9) (9 - 12)

(a) Requirements

1. possession of a Massachusetts classroom teaching certificate
2. three years of employment in the role covered by that certificate
3. completion of a pre-practicum consisting of 24 semester hours of courses and other experiences on the graduate level as defined by Standards I - V, below
4. completion of a half practicum (150 clock hours) within one year, or an internship (300 clock hours) within two years, judged successful on the basis of the standards

(b) Standard I. The effective principal knows:

1. Theories of curriculum design and evaluation
2. theories and techniques of supervision and evaluation of personnel
3. school law, budgeting, plant management
4. human relations and community education
5. sociology and philosophy of education
6. organizational characteristics of schools and strategies for institutional change

(c) Standard II. The effective administrator communicates clearly and appropriately. To meet this standard, the candidate will demonstrate that he or she:

1. presents instructional goals and policies effectively to teachers, students, parents, and the community
2. presents the needs and concerns of teachers and students to other administrators and to the community

(d) Standard III. The effective administrator sets goals, establishes priorities, allocates resources and facilitates the instructional process in response to the needs of learners, teachers, and the community. To meet this standard, the candidate will demonstrate that he or she:

1. analyzes and defines the educational needs of students, teachers, and the community
2. plans and implements programs responsive to these needs
3. allocates resources equitably and efficiently
4. encourages staff and community initiative and involvement in the development of instructional programs
5. coordinates related aspects of instructional programs

(e) Standard IV. The effective administrator uses the results of various evaluative procedures to assess the effectiveness of programs and personnel. To meet this standard, the candidate will demonstrate that he or she:

1. selects, uses, and interprets appropriate evaluation techniques and instruments
2. uses the results of evaluation to improve programs and the performance of personnel

3. supervises staff in an equitable, open, and constructive manner
 4. evaluates his or her own role, behavior and performance
- (f) Standard V. The effective administrator deals in an equitable, sensitive and responsive manner with students, teachers, parents, and the community. To meet this standard, the candidate will demonstrate that he or she:
1. actively promotes the principles of a democratic society
 2. fosters a school environment favorable to openness of inquiry and devoid of ridicule
 3. accepts and respects individual and group differences in values, religion, race language, and social background

(15) Level of Practicum or Internship. Each practicum or internship must be designed for certification at one designated level and will be accepted at that level only. The appropriate official at the supervising institution must designate the level for which each such experience is a preparation.

(50) Superintendent/Assistant Superintendent (All levels)

(a) Requirements

1. possession of a Massachusetts teacher's certificate
2. three years of employment in the role covered by that certificate
3. completion of a pre-practicum consisting of 24 semester hours of course work and other experiences on the graduate level as defined in Standards I - V, below
4. completion of a half practicum (150 clock hours) within one year, or an internship (300 clock hours) within two years, judged successful on the basis of the standards

(b) Standard I. The effective superintendent knows:

1. sociology, economics, history and philosophy of education
2. theories of curriculum design and evaluation
3. educational administration in general, including fiscal planning, personnel planning and program planning; budgeting; plant management; labor relations and collective bargaining; state and municipal financing; school law; public relations
4. theories and techniques of supervision and evaluation of personnel
5. theory, research, and practice in the area of human relations
6. approaches to community education
7. organizational characteristics of schools and strategies of institutional change
8. recent research in education, and particularly in educational administration

(c) Standard II. See above under School Principal

(d) Standard III. See above under School Principal

(e) Standard IV. See above under School Principal

(f) Standard V. See above under School Principal

League of Women Voters of Massachusetts Statement



120 Boylston Street
Boston, Mass. 02116

Presented by Barbara Schnuer, Education Specialist of the League of Women Voters of Massachusetts, before the Study Committee on Evaluation of Educational Personnel, May 21, 1980.

The League of Women Voters of Massachusetts supports "provisions in the law for the evaluation of teachers on a regular basis through the use of specified procedures". We reached this consensus in 1976 after a study of collective bargaining and tenure that included a survey of 75 communities in Massachusetts.

Therefore, the League supports the study committee's recommendation: "Each school district should have a comprehensive evaluation policy."

In our view, the draft recommendations imply that educational personnel be evaluated on a regular basis. We suggest that the language of the recommendations clearly specify "evaluation on a regular basis."

The League agrees that higher priority be given by Massachusetts public school districts to improved evaluation of educational personnel. We know that the Board of Education shares this sense of priority. Therefore, we propose that the Board file legislation that would require the evaluation of educational personnel on a regular basis through specified procedures.

In closing, I would like to commend the Study Committee for its thorough and conscientious work. The committee staff is to be commended for its cooperation and courtesy in dealing with the public.



Statement on Teacher Evaluation
As Recommended by the
MTA Task Force on Teacher Evaluation

I. Introduction

"The entire field of teacher evaluation has suffered from a surplus of opinion and a shortage of evidence." Levin, Benjy, "Teacher Evaluation - A Review of Research." Educational Leadership, p. 244, December, 1979.

We in MTA are wise to be cautious of participation in the legislation of popular practices. Since the public demands evaluations and the Legislature is actively considering legislation requiring evaluations, we must exercise leadership to produce alternatives that will renew confidence in our performance and in the quality of the public schools and colleges. Reliance on a single evaluation technique is unwise. Using several approaches to insure that each educator is judged as fairly as possible is one way to counteract the biases of the various methods.

II. Purpose of Evaluation

The evaluation process should exist for the ultimate improvement of instruction.

III. Basic Tenets

- A. Negotiations at the local level should be the key element in the total process of evaluation for education personnel.
- B. The conceptual structure for the evaluation of educational personnel should be broadly addressed so that it can be applied to any professional employed in a particular system.

IV. Principles

- A. All criteria, procedures and evaluations must be the written results of meaningful involvement of those affected.
- B. No educator shall be adversely evaluated or otherwise deprived of any professional advantage without just cause.

C. The evaluation process must admit that many of the problems observed in a given situation stem from conditions beyond the control or influence of the educator, i.e. the nature, variety, and availability of learning resources; the physical environment of the classroom; the composition and size of the class; etc.

D. Training in the evaluation process must be provided for all those affected.

E. The evaluation process must make provisions for the improvement in all phases of the educational process, i.e. courses, materials, class size, personnel, etc.

F. All evaluations should be documented and provide procedural due process.

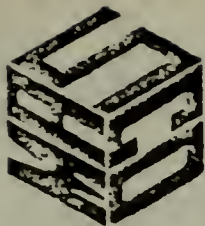
G. Evaluators must use extra care to protect evaluatees from harmful stress which is a natural by-product of any evaluation process. It is harmful only when evaluations are used in a vindictive, arbitrary, and/or coercive manner without warning, especially for purposes of RIF or punishment.

H. Seniority assumes successful prior evaluations.

V. Conclusion

Strengths and weaknesses agreed upon by an evaluator and evaluatee may bring an individual to a recognition that no behavior will change unless an individual can become aware of, and measure, his/her professional growth. Anything that contributes to that internal, personal experience should be encouraged.

*Preliminary Draft Adopted
by the MTA Board of Directors
on February 9, 1980*



Massachusetts Association
for
Supervision and Curriculum Development

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June 3, 1980

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Westborough

Gregory R. Anrig, Commissioner of Education
Study Committee on Evaluation of Personnel
Massachusetts Department of Education
31 St. James Avenue
Boston, Massachusetts 02116

Dear Commissioner Anrig and
Members of the Study Committee:

The Board of Directors of the Massachusetts Association for Supervision and Curriculum Development have delegated to Dr. Robert Munnelly, a Board member of both our national organization, the Association for Supervision and Curriculum Development and MASCD, the responsibility of speaking for the Board on issues relating to the Study Commission on the Evaluation of Educational Personnel.

Munnelly has recommended that MASCD endorse the Commission's draft statement "Principles of Evaluation" as a succinct and comprehensive restatement of the important findings in the field of supervision. As he sees it, the statement will serve as a significant set of criteria by which school officials and citizens in the local communities of the commonwealth can "evaluate" their local processes and procedures. This should contribute greatly to the development of public confidence in the local evaluation procedures which seek to improve professional performance and judge total job effectiveness in the local school district.

I am most pleased to be able to affirm the recommendation of Dr. Munnelly and transmit to you the positive perspective MASCD has for the "Principles" and the work of the Study Committee.

Sincerely,

Gilbert F. Bulley

Gilbert Bulley
President



Massachusetts Federation of Teachers

AFT, AFL-CIO

MAIN OFFICE: 114 Western Avenue • Lynn, MA 01904 • 617-593-6800

LEGAL / LEGISLATIVE OFFICE: 14 Beacon Street • Boston, MA 02108 • 617-227-7965

TEACHER EVALUATION AND LAYOFFS

- WHEREAS, the Department of Education has established a Study Committee to Evaluate Educational Personnel, and
- WHEREAS, that Committee has submitted its recommendations to the State Board and through the State Board to all local school officials, and
- WHEREAS, a public hearing will be held at the Minuteman Regional Vocational Technical High School in Lexington on May 21, 1980; therefore be it
- RESOLVED: that the Massachusetts Federation of Teachers go on record at such hearing reaffirming MFT policy on teacher evaluation; and be it further
- RESOLVED: that the MFT record its strong objections to the utilization of evaluations when there are to be layoffs.

MASSACHUSETTS ASSOCIATION OF SCHOOL SUPERINTENDENTS, INC.

POSITION PAPER ON THE
STUDY COMMISSION ON THE EVALUATION OF EDUCATIONAL PERSONNEL

The Executive Board of the Massachusetts Association of School Superintendents affirms the critical importance of personnel evaluation in the schools and school districts of the Commonwealth. It is through effective personnel evaluation and the related supervisory activities of the evaluation process that schools focus on the improvement of the quality of instruction and encourage the professional growth of the individual members of the staff. Effective evaluation results in decisions about the retention and promotion of staff, and, equally important, the dismissal or non-renewal of the unsuccessful people. The existence of a vigorous process of evaluation and supervision provides to the public assurance of quality. Clearly, evaluation is not a low priority activity in good school systems.

As the study team appointed by the State Board of Education reviews the "state of the art" of evaluation in Massachusetts, it will undoubtedly find a wide variety of approaches and practices concerning evaluation of professional staff.

Many examples of successful practices with regard to staff evaluation exist in the Commonwealth. Over the years, many local communities developed high quality programs of staff evaluation.

The M.A.S.S. Executive Board endorses the study team's goal of identifying some basic principles of successful evaluation and of highlighting examples of successful practices in communities across the state. The aim of generating descriptive research on evaluation practices is laudatory and will be an important feature of the study team's work.

With information of this sort in hand, the citizens, taxpayers, parents, school committee members, students and teaching staff, and administrators of each

of the local districts will be able to assess their local district's evaluation efforts and re-examine the priority assigned by the community to staff evaluation.

Effective staff evaluation must be a high priority concern of each school district. It is dependent on having a corps of evaluators who are skilled in the management of faculty evaluation. It takes a significant amount of time and effort on the part of evaluators and evaluatees to carry out an effective program.

The Massachusetts Association of School Superintendents urges the State Board and the Commissioner of Education to promote the importance of evaluation processes developed locally in each district. Mandating evaluation practices on local districts as happened in California and Pennsylvania in the early '70's should be avoided. Instead, state-supported funding for the on-going training of local staff evaluators is suggested as the best way for the State Board to influence the quality of evaluation practices in the Commonwealth.

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Adopted by vote of the
Executive Committee
April 17, 1980



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POSITION STATEMENT ON THE DRAFT RECOMMENDATIONS ON THE STUDY COMMITTEE ON EVALUATION OF EDUCATIONAL PERSONNEL

The Massachusetts Association of School Committees offers the following comments on the draft proposal on evaluation of educational personnel.

It is the MASC view that the ultimate goal of evaluation of professional staff is the improvement of the system to benefit students. This is not the focus of the draft statement. Evaluation is never addressed as a management tool; the process as described relates only to the individual's job effectiveness. The burden for the success of the process is placed entirely on the administrative team. The participation of the professional being evaluated is not considered except to allow response and individual input. MASC believes that the professional being evaluated has a responsibility to react in a positive way to evaluation.

The conclusion on reading the draft might well be that evaluation exists for its own sake and that of the employee being evaluated.

MASC believes that the inclusion of a reference to "reduction in force" is inappropriate in as much as it is a matter of statute and collective bargaining.

MSSAA believes that the purpose of evaluation of educational personnel should be as follows:

1. To enhance a positive learning experience for students in the total school environment.
2. To improve instruction.
3. To encourage professional creativity and experimentation in the learning process and environment.
4. To provide a means by which the educator will continually analyze and assess his or her professional strengths and weaknesses.
5. To provide a means through which the evaluator and evaluatee will cooperatively identify educators' strengths and weaknesses as well as approaches for reinforcing strengths and overcoming weaknesses.
6. In addition to the prior purposes, educators' evaluation information may be used by the administration to make recommendations concerning continued employment of personnel, the granting of continuing contracts, the granting of increments, and/or other recommendations to the School Committee.

MSSAA further believes that the primary objective in the evaluation process is to bring about the continuous growth and development of educational personnel to ensure the highest quality of education for our students.

In order for these objectives to be accomplished, we recommend to the Study Committee on Evaluation of Educational Personnel the following guiding principles be added to those developed by the Committee:

1. The evaluation of educational personnel is a local responsibility. Evaluation policies should be locally designed and locally controlled and not mandated by the state.
2. The evaluator and evaluatee will cooperatively develop the criteria which will serve as a basis for the teacher evaluation process.
3. Every reasonable effort will be made to ensure that the educator knows:
 - (a) the person(s) responsible for his/her evaluation and
 - (b) the process by which he/she will be evaluated.
4. The general responsibilities and specific tasks of the educator's position will be comprehensively defined, and this definition will serve as a frame of reference for evaluation of educators.
5. Self-evaluation will be an aspect of the evaluation process, and educators will be given the opportunity to evaluate themselves in positive and constructive ways.
6. Evaluation will be more diagnostic than judgmental.
7. The evaluation process will provide for clear, personalized, constructive feedback, including a variety of resources such as in-service education, observation opportunities, peer assistance, increased supervision, help from personnel not involved in the evaluation process, and other techniques which may be designed by each school district.

8. Evaluation will take into consideration influences on the learning environment such as material, physical plant, and professional resources as well as external influences on both educator and students.
9. All evaluations will take place without any bias as to race, creed, religion, national origin, sex, age, or residency.
10. That all evaluations will be the result of a cooperative process where a positive atmosphere is maintained between evaluator and evaluatee in the assessment of teacher performance.
11. That all School Committees should strive through their administration and staff to provide workshops, etc., for the primary objective of improving the evaluation of all educational personnel.
12. The comprehensive evaluation policy of each school district should include evaluation of administrators, supervisors, and other non-classroom professional personnel, in addition to the evaluation of teachers.
13. Educators are encouraged to seek student and peer input on their performance for their own growth and development; however, such information should not be considered a part of the formal evaluation process.

MSSAA feels strongly that the process of evaluation of educational personnel is a most vital one, that the building principal is a key component in developing and executing this process. Therefore, the MSSAA stands ready to assist the Study Committee on Evaluation of Educational Personnel in order to promote the improvement of educational practices across the Commonwealth.

APPENDIX D

MASSACHUSETTS GENERAL LAWS, CHAPTER 71

SECTION 37. POWERS AND DUTIES. It shall have general charge of all public schools, including the evening schools and evening high schools, and of vocational schools and departments when not otherwise provided for. It may determine, subject to this chapter, the number of weeks and the hours during which such schools shall be in session, and may make regulations as to attendance therein.

SECTION 41. TENURE OF TEACHERS AND SUPERINTENDENTS; CONTRACTS WITH SUPERINTENDENTS. Every school committee, in electing a teacher who has served in its public schools for the three previous consecutive school years, shall employ him to serve at its discretion, except as provided in section thirty-eight G; but any school committee may elect a teacher who has served in its schools for not less than one school year to serve at such discretion. A teacher not serving at discretion shall be notified in writing on or before April fifteenth whenever such person is not to be employed for the following school year. Unless said notice is given as herein provided, a teacher not serving at discretion shall be deemed to be appointed for the following school years.

A school committee may award a contract to a superintendent of schools for a period not exceeding six years. Nothing in this section shall be construed to prevent a school committee from voting to employ a superintendent of schools who has completed three or more years' service to serve at its discretion.

SECTION 42. DISCHARGE OF TEACHERS AND SUPERINTENDENTS. The school committee may dismiss any teacher, but no teacher and no superintendent, other than a union superintendent and the superintendent of schools in the city of Boston, shall be dismissed unless by a two thirds vote of the whole committee. A teacher not employed at discretion under the preceding section and who has been teaching for more than ninety days shall not be dismissed for any reason unless at least fifteen days, exclusive of customary vacation periods, prior to the meetings at which the vote is to be taken, he shall have been notified of such intended vote and, if he so requests, he shall have been furnished by the committee with a written statement of the cause or causes for which the dismissal is proposed and if he so requests, he has been given a hearing before the school committee at which he may be represented by counsel, present evidence and call witnesses to testify in his behalf and examine them, and the superintendent shall have given the committee his recommendation thereon. In every such town a teacher or superintendent employed at discretion under section forty-one or a superintendent employed under a contract, for the duration of his contract, shall not be dismissed, except for inefficiency, incapacity, conduct unbecoming a teacher or superintendent, insubordination or other good cause, nor unless at least thirty days, exclusive of customary vacation periods, prior to the meeting at which the vote is to be taken, he shall have been notified of such intended vote; nor unless, if he so requests, he shall have been furnished by the committee with a written charge or charges of the cause or causes for which his dismissal is proposed; nor unless, if he so requests,

he has been given a hearing before the school committee which may be either public or private at the discretion of the school committee and at which he may be represented by counsel, present evidence and call witnesses to testify in his behalf and examine them; nor unless the charge or charges shall have been substantiated; nor unless, in the case of a teacher, the superintendent shall have given the committee his recommendations thereon. The change of marital status of a female teacher or superintendent shall not be considered cause for dismissal under this section. Neither this nor the preceding section shall affect the right of a committee to dismiss a teacher whenever an actual decrease in the number of pupils in the schools of the town renders such action advisable. In case a decrease in the number of pupils in the schools of a town renders advisable the dismissal of one or more teachers, a teacher who is serving at the discretion of a school committee under section forty-one shall not be dismissed if there is a teacher not serving at discretion whose position the teacher serving at discretion is qualified to fill. No teacher or superintendent who has been lawfully dismissed shall receive compensation for services rendered thereafter.

SECTION 42A. DEMOTION OF PRINCIPALS AND SUPERVISORS. No principal, supervisor, assistant principal, or professional employee performing the duties of a principal, supervisor, assistant principal, by whatever title his position may be known, who has served in that position for over three years shall without his consent be demoted except for inefficiency, incapacity, unbecoming conduct, insubordination or other good cause; nor unless, at least thirty days, exclusive of customary vacation periods, prior to the meeting at which the vote is to be taken, he shall have been notified of such intended vote; nor unless, if he so requests, he shall have been furnished by the committee with a written charge or charges of the cause or causes for which his demotion is proposed; nor unless, if he so requests, he has been given a hearing before the school committee, which may be either public or private at the discretion of the school committee, and at which he may be represented by counsel, present evidence and call witnesses to testify in his behalf and examine them; nor unless the charge or charges shall have been substantiated; nor unless the superintendent shall have given the committee his recommendations thereon.

For the purpose of this section, a person shall be deemed to have been demoted if his salary has been reduced contrary to the provisions of section forty-three of this chapter or if he has been transferred without his consent to a position wherein he no longer serves at discretion.

Any person who has been demoted by vote of a school committee under the provisions of this section may within thirty days after the vote of dismissal or demotion appeal therefrom to the superior court in the county in which he was employed.

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